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WATERTON TOURISM STUDY

EXIT SURVEY REPORT

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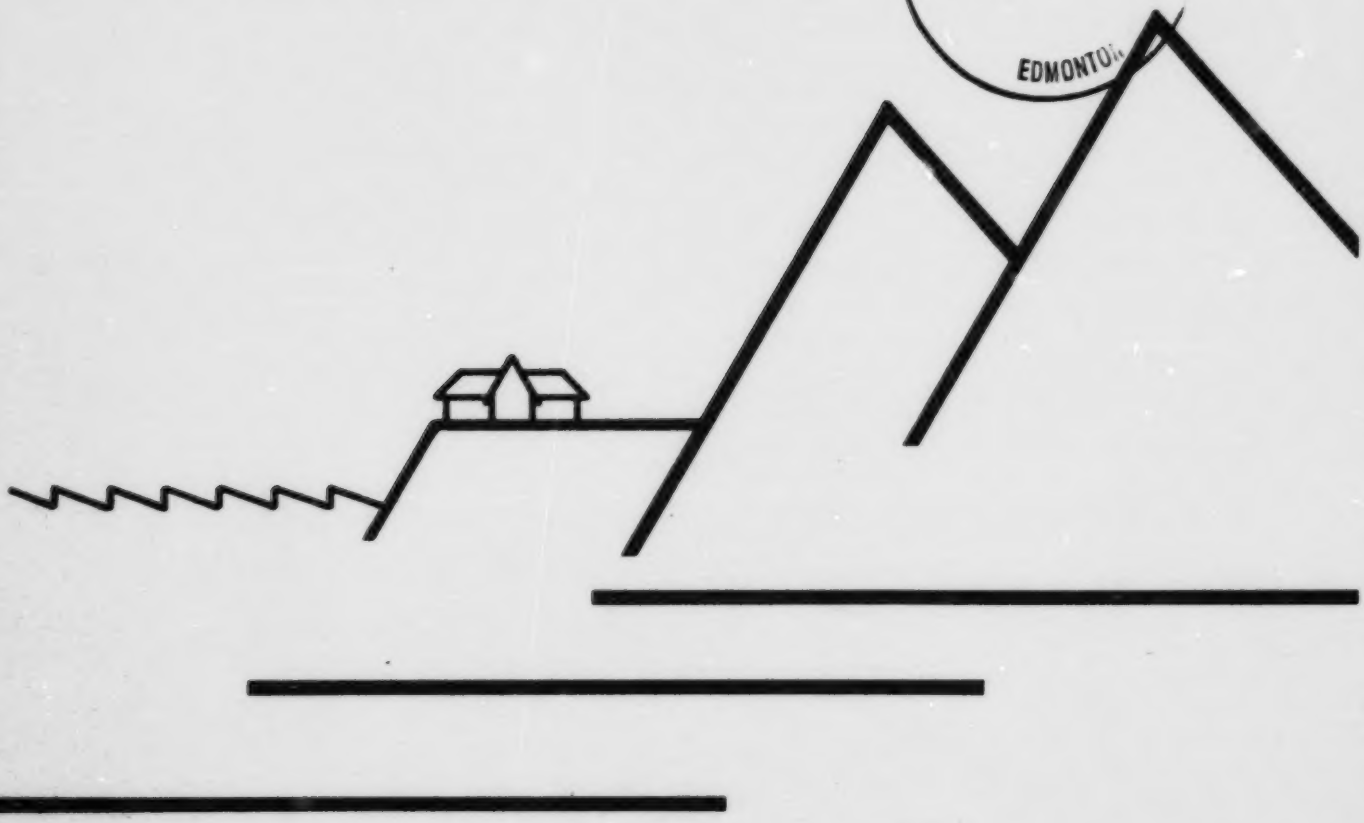

PANNELL
KERR
FORSTER
Management Consultants

91-06681/

Alberta
TOURISM

Office of the Deputy Minister

6th Floor, CityCentre, 10155 - 102 Street, Edmonton, Alberta, Canada T5J 4L6 403/427-4368 Fax 403/427-2852

February, 1991

TO WHOM IT MAY CONCERN

The following consultant's study was undertaken to provide tourism information on Waterton Lakes National Park. The study involved two major components: collection of primary data on existing visitor use of the Park; and preparation of a marketing strategy. Much of the work for the study was completed in 1988. However, verification of some of the data from the surveys was required. Due to unforeseen delays, the study is only now being released. It is felt that the information obtained from the study is still relevant.

This report contains results from the exit survey which was conducted to obtain a profile of visitors to Waterton Lakes National Park. The Marketing Strategy report is available under separate cover.

It should be noted that this study was conducted by an independent consultant commissioned by Alberta Tourism. As such, this study does not represent government policy, nor does it imply any commitment to implementation. It is recognized that implementation of the marketing strategy will be addressed in a manner that is consistent with Canadian Parks Service policies, and the park management planning process.

If you have any comments regarding the report, please contact:

Regional Planning Unit
Planning Division
Alberta Tourism
5th Floor, CityCentre
10155 - 102 Street
Edmonton, Alberta
T5J 4L6

Telephone: 427-2501

Yours sincerely,

Bernard F. Campbell
Deputy Minister

WATERTON TOURISM STUDY

EXIT SURVEY
November 1, 1986 to October 31, 1987

Prepared for:

Alberta Tourism

Prepared by:

J.R. Ritchie, Ph.D.
In Association with
Pannell Kerr Forster

March 1988

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Printed on Recycled Paper

WATERTON TOURISM STUDY
EXIT SURVEY

SUMMARY

The Exit Survey of visitors to Waterton Lakes National Park was conducted to provide a data base for tourism planning and marketing. Personal interviews of 1,666 randomly selected visitors were conducted over a 12 month period from November 1, 1986 to October 31, 1987. The Exit Survey was a major component of the Waterton Tourism Study to identify tourism opportunities and develop a marketing strategy to capitalize on them.

The Steering Committee formed by Alberta Tourism was comprised of representatives from Alberta Tourism, Canadian Parks Service, Department of Regional Industrial Expansion, Waterton Chamber of Commerce and Visitors Association and the Chinook Country Tourist Association.

A summary visitor profile is presented on the following pages. Highlights of the profile are:

- 70% of the 325,338 visits occurred during the summer period, June 15 to September 7, 1987.
- 53% of the visitors were from Alberta, 10% from the rest of Canada, 34% from the United States and 3% from Europe and other countries.
- Lethbridge, Calgary, Edmonton and Cardston were the most significant communities of origin for visitors from Alberta.
- Montana and California were the most significant states of origin for visitors from the United States.
- Outside of Alberta, British Columbia and Ontario were the most significant provinces of origin for visitors from Canada.

- The majority of visits were by couples or family/relative groups on vacation or on day use or social trips to the Park.

- 56% of the visitors had household incomes of $40,000 or more.

- 85% of the annual total expenditure of $8.9 million by visitors occurred in the summer period.

- The average expenditure per person per visit was $27.32.

- Visitors staying overnight in the Park stayed an average of 3.5 nights.

- The main destination for 70% of the visitors was Waterton.

- Sightseeing by car, walking and wildlife viewing were the most popular visitor activities. Hiking trails, information centre and the scenic boat tour were the most popular facilities and programs used by visitors.

- The Prince of Wales Hotel, Cameron Falls and Cameron Lake were the most frequently visited attractions in the Park.

- Previous experience in visiting the park, referrals or comments from friends and relatives, and referrals from tourist information centres were the main sources of information influencing visitation to the Park.

- 81% of the visitors rated their visit to the Park as very good to excellent. Less than one-half of one percent rated their visit as poor.

- More facilities and activities, and more and better facilities were the main visitor suggestions for improving the Park.

SUMMARY VISITOR PROFILE
WATERTON LAKES NATIONAL PARK
NOVEMBER 1, 1986 TO OCTOBER 31, 1987

	Winter	Spring	Summer	Fall	Annual
A. VOLUME **					
Total estimated vehicles	6,604	20,155	81,164	10,189	118,112
Average vehicle party size	2.71	2.75	2.81	2.35	2.75
Total visits ('000)	17,897	55,426	228,071	23,944	325,338
Average nights in Waterton (All Visits)	0.8	0.5	1.7	1.3	1.4
Total visit-nights	14,318	27,713	387,720	31,127	460,878
B. DURATION					
All Visits					
Average No. of Nights on Trip	2.2	4.1	10.0	8.4	8.4
Average No. of Nights in Alberta	2.0	2.1	3.7	3.3	3.3
Average No. of Nights in Park	0.8	0.5	1.7	1.3	1.4
1 + Night Visits Only					
Average No. of Nights on Trip	8.0	8.5	13.2	12.6	12.5
Average No. of Nights in Alberta	7.2	4.6	5.7	5.1	5.5
Average No. of Nights in Park	10.4	1.7	3.7	3.5	3.5
C. VISITOR ORIGIN					
Southern Alberta	75%	55%	28%	28%	35%
Calgary	6	15	8	6	9
Edmonton Metro	3	1	4	9	4
Central/Northern Alberta	3	2	6	4	5
British Columbia	2	4	3	11	4
Saskatchewan	2	*	4	3	3
Ontario	2	1	2	2	2
Other Canada	1	1	1	6	1
Montana	*	3	7	2	6
Other Northwest States	2	2	6	6	5
California	1	3	5	4	4
Other States	1	10	24	14	19
Europe & Other Countries	*	3	2	5	3
D. VEHICLE TYPE					
Car	69%	63%	62%	59%	62%
Truck/Truck Camper/Van	30	31	33	33	32
Motorhome/R.V.	*	5	4	6	4
Motorcycle/Bicycle	*	1	1	2	1
E. OVERNIGHT ACCOMMODATION IN PARK					
Hotel/Motel	39%	38%	49%	44%	47%
Campground	13	49	44	50	45
Cottage/Home of Friend	48	12	6	6	7
Other	*	1	1	*	1
F. PRIMARY TRIP PURPOSE TO WATERTON					
Vacation	7%	32%	64%	47%	54%
Day Use/Social	78	55	27	39	36
Personal/Family	6	6	6	4	6
Personal Business	3	4	2	2	2
Business	6	2	1	2	1
Attend Meeting	*	*	1	6	1
G. NATURE/COMPOSITION OF TRAVEL PARTY					
Couple	28%	28%	38%	46%	37%
Family/Relatives	38	43	41	23	40
Friends	17	16	11	8	12
Alone	15	13	9	19	10
Other	3	1	1	3	1
H. HOUSEHOLD INCOME					
Less than $20,000	19%	23%	13%	11%	15%
$20,000 to $39,000	39	28	28	40	29
$40,000 to $59,000	22	27	28	30	28
$60,000 +	20	22	31	21	28

SUMMARY VISITOR PROFILE
WATERTON LAKES NATIONAL PARK
NOVEMBER 1, 1986 TO OCTOBER 31, 1987
(Continued)

	Winter	Spring	Summer	Fall	Annual
I. EXPENDITURES IN WATERTON/PERSON/VISIT					
Meals and Refreshments	$0.95	$5.06	$9.29	$6.01	$7.88
Groceries & Beverages in Stores	0.14	1.39	2.22	1.39	1.91
Accommodation	0.72	3.41	9.72	4.51	7.77
Gas & Oil	0.11	0.71	1.28	0.42	1.06
Auto Maintenance & Repairs	0.00	0.06	0.19	0.12	0.14
Park Entrance Fees and Licenses	0.00	1.30	1.28	0.95	1.19
Recreation & Entertainment	0.07	0.79	2.59	0.89	2.02
Conference/Convention Registration Fees	0.00	0.05	0.20	0.25	0.17
Retail Store Purchases	0.10	2.24	6.06	2.89	4.65
All Other Goods & Services	0.03	0.09	0.42	0.27	0.32
Total Per Person Per Visit	2.11	15.08	33.24	17.60	27.32
Total Expenditures in Waterton ('000)	37.8	836.0	7,580.7	421.4	8,876.0
J. MAIN TRIP DESTINATION IN ALBERTA					
Waterton	76	72	69	65	70
Banff	*	2	4	11	4
Calgary	1	2	5	1	4
Jasper	*	4	4	2	4
Edmonton	*	1	3	1	2
Lethbridge	4	5	2	3	2
Other S.W. Alberta	18	4	5	10	6
Other Alberta	1	4	4	2	4
None	*	6	4	5	4
K. VISITOR ACTIVITIES (ANNUAL TOP 10) ***					
Sightseeing by Car	85%	81%	87%	91%	86%
Walking	39	68	79	82	75
Wildlife Viewing	56	64	68	72	67
Photography	34	44	58	62	55
Shopping	3	38	63	30	53
Resting/Relaxing	12	39	48	43	44
Restaurant Dining	9	31	50	42	44
Visiting Glacier Park	2	21	50	39	41
Vegetation/Flora Viewing	12	37	43	44	41
Bird Watching	19	25	27	37	27
L. FACILITIES/PROGRAMS USED BY VISITOR (ANNUAL TOP 5) ***					
Hiking Trails	20%	35%	40%	43%	38%
Information Centre	4	14	35	22	29
Scenic Boat Tour	*	4	18	6	14
Interpretive/Education Programs	1	4	16	18	13
No Facilities/Programs	70	51	35	36	40
M. ATTRACTIONS/SITES VISITED IN WATERTON (ANNUAL TOP 5) ***					
Prince of Wales Hotel	13%	40%	61%	47%	53%
Cameron Falls	49	50	47	45	49
Cameron Lake	26	30	41	40	38
Red Rock Canyon	24	32	37	47	37
Marina	10	29	34	28	31
N. TIMING OF DECISION TO VISIT WATERTON					
Same Day	61%	40%	23%	28%	28%
Within Previous Week	32	36	35	45	36
Within Previous Month	4	13	17	14	15
Within Previous 3 Months	2	7	14	8	12
More than Previous 3 Months	1	4	12	6	9

SUMMARY VISITOR PROFILE
WATERTON LAKES NATIONAL PARK
NOVEMBER 1, 1986 TO OCTOBER 31, 1987
(Continued)

	Winter	Spring	Summer	Fall	Annual
O. **SOURCES OF INFORMATION INFLUENCING VISIT TO WATERTON**					
Previous Experience	66%	57%	39%	47%	44%
Friends and Relatives	24	19	23	22	23
Tourist Information Centres	1	6	12	9	10
Map, Atlas	1	2	5	6	4
Glacier Park	*	3	5	1	4
Travel Article	*	3	4	8	4
Travel Guides	2	2	2	3	2
Alberta Travel Literature	1	2	1	*	1
Other Brochure	1	1	1	*	1
Travel Agent	*	1	1	*	1
Advertisement	*	1	*	*	*
Other	2	2	3	4	3
No Information Used	2	1	4	*	3
P. **OVERALL SATISFACTION WITH VISIT**					
Excellent	20%	34%	38%	45%	37%
Very Good	34	40	46	46	44
Good	34	21	14	7	16
Fair	9	5	2	2	3
Poor	2	*	*	1	*
Q. **VISITOR SUGGESTIONS FOR IMPROVEMENT (ANNUAL TOP 10)** ***					
More Facilities, Activities	7%	11%	10%	6%	10%
Better Camping Facilities	3	8	8	5	7
More Camping Facilities	7	6	6	3	6
More Places Open	22	4	2	14	4
Better Signage	1	3	3	6	3
Control on Growth	5	2	2	3	3
More Restaurants	1	3	3	1	3
Better Roads	1	1	2	1	2
More Hotel Facilities	*	1	2	*	2
Nothing in Particular	47	55	56	53	55

* = Less than 1/2 of 1% or zero.
** = Excludes motorcoach tour passengers.
*** = Multiple responses allowed.
Note: May not add to 100% due to rounding or multiple responses allowed.

Winter = November 1, 1986 to April 14, 1987
Spring = April 15 to June 14, 1987
Summer = June 15 to September 7, 1987
Fall = September 8 to October 31, 1987

WATERTON TOURISM STUDY
EXIT SURVEY

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* Table is opposite this page number.

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Brenda Bush-LaFrance	Alberta Tourism
Jim Hartley	Canadian Parks Service
Tom Hill	Department of Regional Industrial Expansion
Alan Koehler	Alberta Tourism
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Beth Russell	Chinook Country Tourist Association and Waterton Chamber of Commerce and Visitors Association
Randy Smith	Chinook Country Tourist Association
Georgine Ulmer	Department of Regional Industrial Expansion

Mr. Koehler served as the Committee Chairman and liaison with the consultant.

Principal members of the consulting team included:

Ed Romanowski	Project Manager Pannell Kerr Forster
Yvonne Brouwers	Pannell Kerr Forster
Brent Ritchie	Independent Consultant
Peter Walsh	Pannell Kerr Forster
Neil McNeil	Pannell Kerr Forster
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Barb Sokolan	Pannell Kerr Forster
Gavin Fick	Independent Researcher

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1.0 INTRODUCTION

1.1 Purpose

The overall purpose of the Waterton Exit Survey was to provide a data base for tourism planning and marketing related to Waterton Lakes National Park.

1.2 Objectives

In specific terms, the survey sought to meet the following objectives:

1. to determine the volume and structure of total visitation to Waterton Lakes National Park for the period November 1, 1986 to October 31, 1987;
2. to provide a socio-demographic profile of individuals visiting Waterton Lakes National Park for tourism-related purposes;
3. to document the travel/trip characteristics and behaviours of those individuals visiting Waterton Lakes for tourism-related purposes;
4. to measure the level and nature of expenditures made in Waterton by individuals visiting for tourism-related purposes; and
5. to monitor views concerning satisfaction/dissatisfaction with their visit to Waterton Lakes National Park.

1.3 Sampling and Data Collection

The study was an exit survey in which randomly selected representatives of travel parties left Waterton Lakes National Park by private vehicle. A separate survey of motorcoach passengers was conducted and is reported under separate cover.

A multi-stage stratified probability sample, stratified by weekday/weekend and season was designed to generate a random sample of "stints" (three hour periods selected for interviewing) during which visitor interviews and visitor and non-visitor vehicle counts were conducted. Vehicle counters on

the exit road provided around the clock traffic data for the 12 month survey period.

The seasons used for the survey period are as follows:

Winter	- November 1, 1986 to April 14, 1987
Spring	- April 15 to June 14, 1987
Summer	- June 15 to September 7, 1987
Fall	- September 8 to October 31, 1987

Survey completions (cases) were computer-weighted to expand the sample, on a season-by-season basis, to reflect characteristics and behaviour of all visitors to the park excluding residents, business deliveries, park employees and other non-qualified visitors during the 12 month period.

Adults (16 years or older) were interviewed as they left Waterton Lakes National Park by road at the park exit gate. The randomly selected respondent had to be leaving the park for the last time on their trip away from home. The interview took from 10 to 30 minutes to complete.

The interviews were conducted by trained interviewers resident in the area. All interviews were conducted in English with only one or two non-English speaking respondents identified that could not be interviewed. A copy of the questionnaire is presented in the Appendix.

A total of 1,666 interviews were completed over the year.

All results presented in this report reflect the weighted estimates for the population of visitors and vehicles over the year. Most questions concerned the individual and the resulting weighted estimate of visitors, 16 years or older, is 262,274 when no responses are missing. Only a few questions were asked concerning the entire travel party (all persons travelling together in the vehicle) such as expenditures and vehicle types. For these questions, the weighted estimate of vehicles is 118,112 when no responses are missing. The total number of visitors, including those younger than 16 years, is estimated at 325,338 over the year.

1.4 Report Organization

The survey results are presented in four sections. Section 2.0 presents an overview of visitor socio-economic characteristics followed by Section 3.0 which presents trip characteristics and behaviours. Visitors' views concerning Waterton are presented in Section 4.0. Visitor expenditures are discussed in Section 5.0. Concluding remarks are made in Section 6.0. Details of the survey methodology including sampling and weighting procedures are presented in Section 7.0

TABLE II-1A

DETAILED ORIGIN OF VISITORS

Geographic Origin (N)	Percentage By Season				
	Winter (14,699)	Spring (43,568)	Summer (182,483)	Fall (21,050)	Annual (261,801)
Cardston	7.2	8.0	2.5	4.6	3.9
Pincher Creek	12.8	5.7	1.8	4.3	3.3
Fort Macleod	1.7	1.4	0.5	0.0	0.7
Lethbridge	31.2	23.2	10.9	11.4	14.1
Other S.W. Alberta	19.9	16.3	10.4	7.8	11.7
Medicine Hat	1.9	0.1	0.7	0.2	0.7
Other Southern Alberta	0.0	0.6	0.8	0.0	0.6
Calgary	8.5	14.6	8.3	5.5	9.2
Red Deer	0.5	0.1	0.2	0.0	0.2
Edmonton Metro	3.4	1.2	4.3	8.9	4.1
Other Central/Northern Alberta	2.6	1.4	5.5	4.4	4.5
S.W. British Columbia	1.3	0.0	0.2	2.7	0.5
Vancouver Metro	0.0	1.6	0.8	2.7	1.0
Victoria	0.0	0.0	0.6	0.5	0.4
Other B.C.	0.6	2.4	1.2	5.1	1.7
Regina	0.7	0.0	0.8	1.7	0.7
Saskatoon	0.0	0.0	1.0	0.0	0.7
Other Saskatchewan	0.9	0.2	2.0	0.9	1.5
Winnipeg	0.5	0.7	0.5	1.2	0.6
Other Manitoba	0.6	0.1	0.1	5.2	0.5
Toronto Metro	0.3	0.5	0.9	0.5	0.8
Other Ontario	1.8	0.6	1.4	1.4	1.3
Montreal	0.0	0.0	0.4	0.0	0.3
Other Quebec	0.2	0.0	0.2	0.0	0.2
Kalispell, Montana	0.0	0.9	0.5	0.0	0.5
Helena, Montana	0.0	0.0	0.8	0.0	0.5
Missoula, Montana	0.0	0.0	0.7	0.4	0.5
Great Falls, Montana	0.0	0.2	1.3	0.0	0.9
Other Montana	0.4	2.4	3.8	2.0	3.2
Idaho	1.5	0.4	1.1	0.5	1.0
Washington	0.2	0.7	1.7	4.9	1.7
North Dakota	0.0	0.0	0.7	0.0	0.5
Oregon	0.0	0.5	1.5	0.2	1.1
Wyoming	0.0	0.0	0.5	0.0	0.4
California	0.6	2.8	5.1	4.2	4.4
Other Southwest States *	0.2	3.9	4.4	4.1	4.1
Northwest States *	0.0	2.6	5.0	0.0	3.9
West Central States *	0.3	1.0	2.2	0.4	1.7
East Central States *	0.0	1.5	6.0	6.1	4.9
North Eastern Seaboard *	0.0	0.5	2.9	1.9	2.2
South Eastern Seaboard *	0.0	0.8	3.1	1.5	2.4
Non - Contiguous States *	0.0	0.0	0.2	0.0	0.2
United Kingdom	0.2	0.6	0.8	0.6	0.7
France	0.0	0.0	0.1	0.0	0.1
West Germany	0.0	0.8	0.3	2.4	0.5
Scandinavian	0.0	0.0	0.2	0.0	0.2
Other W. Europe	0.0	0.1	0.3	0.4	0.3
Japan	0.0	0.3	0.0	0.0	0.0
Australia	0.0	0.2	0.1	1.3	0.2
New Zealand	0.0	0.9	0.1	0.0	0.2
Mexico	0.0	0.0	0.3	0.0	0.2
South America	0.0	0.1	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

* A list of United States in each region is included in the Appendix.

2.0 SURVEY FINDINGS - OVERVIEW OF VISITOR SOCIO-DEMOGRAPHIC CHARACTERISTICS

2.1 Visitor Origin

This section describes the Waterton visitor in terms of overall socio-demographic characteristics. The results are reported by season and for the 12 month period. Of particular importance to planning of marketing activities, there are a number of important and relevant differences across the four seasons. The origin of visitors was compiled on the basis of two levels. Table II-1A provides a detailed breakdown of the origin of Waterton visitors. While these details are useful for ensuring a comprehensive understanding of visitor origin, much of the detail is unnecessary for planning of marketing activities.

A summary table which groups regions of Alberta, North America and other parts of the world (see Table II-1B) has also been prepared. A number of highlights concerning origin emerge from these tables. The single most important markets over the entire year for Waterton are Lethbridge (14.1%) and Calgary (9.2%). The importance of Lethbridge during the winter and spring season is particularly marked. As seen from Table II-1A, over 31% of winter Waterton visitors are from Lethbridge. Edmonton appears to be a particularly important market during the fall (8.9%). During this period, it is second only to Lethbridge in importance. British Columbia is also a significant market in the fall.

Alberta represents 52.9% of Waterton's total market across the entire year. During the winter, Alberta comprises 89.8% of the market. Conversely, Alberta represents only 46.0% of Waterton visitors during the summer season. The remainder of Canada represents a relatively unimportant share of visitors for Waterton. For the entire year, only 10.3% of all Waterton visitors come from parts of Canada outside Alberta.

The United States market provides 34.3% of Waterton visitors annually. As might be anticipated, the single most important state is Montana (5.7%), undoubtedly because of its proximity. Other important regions are California, other southwest states, northwest states and east central states. While the highest market shares for United States visitors are recorded

TABLE II-1B

SUMMARIZED ORIGIN OF VISITORS

Geographic Origin	Percentage by Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(14,699)	(43,568)	(182,483)	(21,050)	(261,801)
	5.6	16.6	69.7	8.0	100.0
Southern Alberta	74.8	55.2	27.7	28.3	34.9
Calgary	8.5	14.6	8.3	5.5	9.2
Edmonton Metro	3.4	1.2	4.3	8.9	4.1
Central/Northern Alberta	3.1	1.5	5.7	4.4	4.7
British Columbia	1.9	4.0	2.9	11.0	3.7
Saskatchewan	1.6	0.2	3.8	2.6	3.0
Manitoba	1.1	0.8	0.6	6.4	1.1
Ontario	2.1	1.1	2.3	1.9	2.1
Quebec	0.2	0.0	0.6	0.0	0.4
Other Canada	0.0	0.0	0.0	0.0	0.0
Montana	0.4	3.5	7.0	2.4	5.7
Other Northwest States *	1.7	1.6	5.6	5.7	4.7
California	0.6	2.9	5.1	4.2	4.4
Other Southwest States *	0.2	3.9	4.4	4.1	4.1
West Central States *	0.3	3.6	7.2	0.4	5.7
East Central States *	0.0	1.5	6.0	6.1	4.9
North Eastern Seaboard *	0.0	0.5	2.9	1.9	2.2
South Eastern Seaboard *	0.0	0.8	3.1	1.5	2.4
Non Contiguous States	0.0	0.0	0.2	0.0	0.2
United Kingdom	0.2	0.6	0.8	0.6	0.7
Europe	0.0	0.9	0.9	2.8	1.0
Japan	0.0	0.3	0.0	0.0	0.0
Australia/New Zealand	0.0	1.1	0.2	1.3	0.4
Mexico and S. America	0.0	0.1	0.3	0.0	0.2
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

* A list of United States in each region is included in the Appendix.

during the summer period, certain regions such as the northwest states and the east central states remain reasonably strong during the fall period. Noticeably, other Europeans and Japanese comprise a very small portion of the total visitation.

Visitation from other countries is mainly from Europe. There were no visitors outside of the United States and Canada interviewed during the winter. Most visited during the summer season with a greater number of Germans and Australians visiting during the fall. Altogether, visitors outside of Canada and the United States comprised only 2.3% of the survey respondents.

On a seasonal basis, summer is the busiest season with over two-thirds of the visits followed by spring, fall and winter.

TABLE II-2

VEHICLE TYPE BY SEASON

Vehicle Type	Percentage By Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(6,604)	(20,155)	(81,164)	(10,189)	(118,112)
Car	63.3	58.4	58.2	57.0	58.4
Station Wagon	5.9	4.2	3.9	2.3	3.9
Truck	20.4	15.7	14.3	21.1	15.5
Truck Camper	1.9	6.0	6.3	1.8	5.6
Van	8.0	9.4	12.1	10.0	11.2
Motorhome	0.4	4.8	4.5	5.5	4.4
Motorcycle	0.3	1.5	0.6	2.2	0.9
Bicycle	0.0	0.0	0.2	0.0	0.1
Total	100.0	100.0	100.0	100.0	100.0
% of Total Vehicles	5.6	17.1	68.7	8.6	100.0

Note: Totals may not add to 100.0% due to rounding.

TABLE II-3

ADDITIONAL EQUIPMENT WITH VEHICLE

Type of Equipment	Percentage By Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(6,604)	(20,155)	(81,164)	(10,189)	(118,112)
Tent Trailer	0.0	0.4	1.6	0.5	1.2
Travel Trailer	0.4	3.1	2.9	0.5	2.6
Horse Trailer	0.0	0.0	0.4	0.0	0.2
Golf Cart	0.8	0.0	0.1	0.0	0.1
Second Vehicle	0.0	0.1	0.2	0.0	0.1

Note: Totals may not add to 100.0% due to rounding.

2.2 Vehicle Type

The distribution of vehicle types used by season is summarized in Table II-2. As shown, the car represented 58.4% of visitor vehicles surveyed. The second most important vehicle category was that of truck (15.5%) followed closely by the van category (11.2%).

As shown in Table II-2, 68.7% of the visitors' vehicles exited in the summer period. Only 5.6% of vehicles exited the park in the winter.

There was some variation in the importance of vehicle types by season. As seen, passenger cars and trucks (usually 1/2 ton) tended to be more important in the non-summer period. Conversely, vans tended to be more popular during the summer relative to other seasons.

2.3 Additional Equipment with Vehicle

In general, relatively few visitors brought along additional equipment towed or attached to their vehicles. While 2.6% and 1.2% of visitors brought travel trailers and tent trailers, respectively, few had additional equipment outside of the summer period.

TABLE II-4

NUMBER OF PERSONS PER VEHICLE

Number of Occupants	Percentage By Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(6,604)	(20,155)	(81,164)	(10,189)	(118,112)
1	16.2	12.7	8.7	19.3	10.7
2	44.8	46.4	48.7	58.1	48.9
3	11.7	14.8	13.6	4.7	12.9
4	14.2	14.5	18.5	10.5	16.9
5	7.4	5.3	5.5	3.8	5.4
6	4.2	3.7	2.3	0.6	2.5
7 or more	1.6	2.6	2.7	3.0	2.6
Total	100.0	100.0	100.0	100.0	100.0
Average No. of Occupants	2.7	2.8	2.8	2.4	2.8

Note: Totals may not add to 100.0% due to rounding.

2.4 Number of Persons Per Vehicle

Data describing the number of persons per vehicle for the entire year and by season are summarized in Table II-4. As indicated, nearly 79% of all vehicles contained two, three or four persons. By far the single most important category in this regard was two persons. While the two person vehicle represented an annual figure of 48.9% of all vehicles, this rose as high as 58.1% during the fall season. Conversely, the four person vehicle which represented 16.9% of all visitors on an annual basis fell to 10.5% share of vehicles during the fall.

The average number of occupants was similar through winter, spring and summer (2.7 to 2.8) and dropped significantly to 2.4 in the fall. This can likely be attributed to the larger proportion of couples and mature adults travelling in the fall as indicated in Section 2.5

TABLE II-5

NATURE/COMPOSITION OF TRAVEL PARTY

Nature/Composition	Percentage By Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(6,604)	(20,155)	(81,164)	(10,189)	(118,112)
Couple	27.5	27.8	38.4	46.0	36.7
Family/Relatives	37.6	43.0	41.2	23.4	39.7
Friends	16.7	15.8	10.9	8.4	11.8
Business Associate	1.7	0.5	0.2	0.0	0.3
School Group	0.1	0.0	0.0	1.3	0.1
Club Association	0.4	0.0	0.5	0.6	0.4
Seniors Group	0.6	0.3	0.3	1.5	0.4
Alone	15.4	12.7	8.6	18.9	10.5
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

TABLE II-6

AGE DISTRIBUTION OF VISITORS

Age Category	Percentage By Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(17,892)	(55,933)	(229,942)	(24,214)	(327,985)
0 - 5 Years	6.8	8.5	5.6	5.4	6.2
5 - 15	11.0	13.6	14.8	7.7	13.9
16 - 19	1.8	1.3	3.7	4.3	3.3
20 - 24	11.2	8.9	6.5	7.6	7.2
25 - 34	20.2	17.4	14.7	16.0	15.5
35 - 44	16.4	13.8	17.0	15.8	16.3
45 - 54	14.2	10.4	13.8	9.6	12.9
55 - 64	9.9	12.7	12.9	15.4	12.9
65 - 74	7.5	10.2	9.2	11.0	9.4
75+	1.0	3.3	1.8	7.1	2.4
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

2.5 Nature/Composition of Travel Party

The responses to this question provide some insight into the nature of the relationships among individuals travelling together in the vehicles which were sampled. Results from the survey reveal that only three of the categories were significant types of travel parties. As seen from Table II-5, the category "family/relatives" was the single most important category at 39.7% of all visitors for the year. This figure was substantially lower during the fall season (23.4%) a figure which correlates with the drop-off in four person (most likely families with children) vehicles as noted in Table II-4.

The second most important category was that of "couple" (36.7%). This category was particularly important during the fall season at which time it represented the single most important type of travel party (46.0% of all visitors for that season).

Finally, the category "friends" represented nearly 12% of all visitors on an annual basis. This varied from a high of 16.7% during the spring to a low of 8.4% during the fall.

A cross-tabulation with place of residence found that school, club, association and seniors groups were from Alberta and Western Canada. Otherwise, the nature and composition of travel parties did not vary significantly by place of residence.

2.6 Age Distribution of Visitors

Only respondents 16 years or older qualified to be interviewed. The results shown in Table II-6 describe the distribution of ages of all visitors. It shows that throughout most of the year, the park attracts families and mature people. In the fall, there is a marked decline in the proportion of children (under 16 years). And in the spring and fall, there is a significant increase in mature (55 years and older) visitors. Only 30.6% of the visitors were under 25 years compared to 38% of the Canadian population (1986 Census) in the same age group. On the other hand, 24.7% of the visitors were 55 years and older compared to 20% of the Canadian population.

A cross-tabulation of the age distribution by place of residence showed that mature visitors were mainly from Alberta, Saskatchewan and California.

TABLE II-7

MALE/FEMALE COMPOSITION OF VISITORS

Sex Category	Percentage By Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(14,699)	(43,568)	(182,957)	(21,050)	(262,274)
Male	60.2	59.0	51.1	57.8	53.4
Female	39.8	41.0	48.9	42.2	46.6
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

TABLE II-8

EDUCATION LEVEL DISTRIBUTION OF VISITORS

Education Level	Percentage By Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(14,650)	(43,371)	(182,337)	(21,050)	(261,409)
No Formal Education	0.1	0.0	0.2	0.0	0.1
Some Grade School	3.0	2.2	0.9	4.4	1.5
Completed High School	3.1	6.6	3.8	3.2	4.2
Some High School	13.0	14.6	8.9	8.2	10.0
Completed High School	18.3	22.6	20.2	20.2	20.5
Some Vocational Schooling	10.6	8.0	9.8	4.6	9.1
Completed Vocational Schooling	11.0	7.5	7.5	11.4	8.0
Some University	16.7	13.8	15.3	19.1	15.4
Completed University	16.5	18.1	22.2	17.8	20.8
Post Graduate University	7.8	6.7	11.3	11.3	10.3
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

2.7 Male/Female Composition of Visitors

Across the entire year covered by the survey, over 53% of those interviewed were male. It was expected that the split would be closer to 50/50. The male to female split in summer was 51.1/48.9 as shown in Table II-7. In the winter, the split was 60.2/39.8. This may indicate a male bias in the visitation to the park. There is no particular explanation for this deviation.

2.8 Education Level Distribution

Table II-8 describes the education level distribution of visitors 16 years and older. Of particular note is the fact that 31.1% reported having completed university or post graduate studies. Another 15.4% indicated they had undertaken at least some university study. The other single largest category related to those who had completed high school (20.5%). For comparison, 13% of the Calgary population 15 years and over had completed university with a degree (1986 Census).

While there was some variation in reported educational levels across seasons, these differences were generally not large and did not appear to provide any particularly useful insights from a marketing perspective. One of the more obvious differences emerging from the data is a relatively greater proportion of individuals possess "some grade school" during the fall season. Examination of occupation categories, however, indicates this difference is probably due to the greater number of students visiting Waterton in the fall.

TABLE II-9

ANNUAL PERSONAL AND HOUSEHOLD INCOME DISTRIBUTION OF VISITORS

Income Category (N)	Income Type	Percentage By Season				
		Winter	Spring	Summer	Fall	Annual
	P	(13,778)	(39,063)	(171,051)	(19,156)	(243,048)
	H	(13,419)	(37,976)	(165,519)	(17,855)	(234,768)
Less than $10,000	P	26.2	25.4	24.6	24.4	24.8
	H	8.8	10.2	4.6	2.0	5.5
$10,000 - $19,999	P	16.0	19.3	12.0	11.9	13.4
	H	10.0	13.1	8.7	8.6	9.3
$20,000 - $29,999	P	21.5	19.0	17.7	20.7	18.4
	H	20.0	13.6	13.0	23.3	14.3
$30,000 - $39,999	P	16.8	12.0	15.6	13.4	14.9
	H	19.1	14.4	14.7	17.1	15.1
$40,000 - $49,999	P	10.1	11.9	13.4	12.6	12.9
	H	13.2	12.4	16.4	16.1	15.5
$50,000 - $59,999	P	3.6	4.0	6.0	8.9	5.8
	H	9.1	14.3	11.7	14.1	12.1
$60,000 - $69,999	P	2.4	4.2	3.9	3.6	3.8
	H	6.3	8.9	10.5	12.6	10.2
$70,000+	P	3.4	4.3	6.8	4.4	6.0
	H	13.7	13.2	20.4	8.3	17.9
Total		100.0	100.0	100.0	100.0	100.0

P = Personal Income

H = Household Income

Note: Totals may not add to 100.0% due to rounding.

2.9 Annual Personal and Household Income Distribution

Paralleling the education data, the results pertaining to annual personal/household income reveals that Waterton visitors also contain a relatively high percentage of up-scale individuals. As shown in Table II-9, over 28% had personal incomes in excess of $40,000 per year. Nearly 56% had total household incomes in excess of $40,000 per year. For comparison, the average personal income in Canada in 1987 was $18,060 (Statistics Canada).

When the findings are examined by season, it is seen that substantial variation in income levels occur. The most marked contrast occurs in the total household income category between summer and fall respondents. In the case of summer respondents, over 20% of households reported incomes in excess of $70,000 compared with a figure of 8.3% for fall respondents. Conversely, over 23% of fall respondents fell in the $20,000 to $30,000 household income category compared with only 13.0% for summer respondents. It is interesting to note the spread between the summer and fall season for this income level category is less pronounced than for individual income levels. It would appear that summer visitors to Waterton have a higher percentage of multiple income households.

The response to income questions during the survey was excellent. Only 6.5% of the respondents refused to answer the personal income question and only 10.0% refused to answer the household income question.

TABLE II-10

OCCUPATION DISTRIBUTION OF VISITORS

Occupation Category	Percentage By Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(14,650)	(43,568)	(182,957)	(21,050)	(262,226)
Professional	18.6	13.9	14.1	10.9	14.0
Manager/Owner	9.0	7.1	9.8	14.7	9.7
Technical	8.9	8.3	12.9	8.7	11.6
Clerical Sales	10.4	11.4	10.0	5.4	9.9
Skilled Labour	7.2	8.0	4.7	4.3	5.3
Unskilled Labour	10.7	9.7	4.7	3.0	5.7
Farmer/Rancher	4.6	2.0	5.3	3.8	4.6
Retired	12.3	21.5	18.3	21.6	18.8
Unemployed	2.5	1.0	1.7	0.6	1.5
Homemaker	9.0	10.1	11.4	14.8	11.3
Student	6.9	6.9	7.1	12.1	7.5
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

2.10 Occupation of Visitors

The occupation category data presented in Table II-10 are quite revealing. Of particular note is the fact that the single most important occupation category for those interviewed is "retired" (18.8%). Occupations of significant importance are: (1) professional - 14.0%, (2) technical - 11.6%, (3) homemaker - 11.3%, (4) clerical sales - 9.9%, (5) manager/owner - 9.7%.

A seasonal variation in the reported occupation of respondents was notable in several cases. These were:

(1) The professional category was substantially more important during the winter (18.6%) than during the fall (10.9%).

(2) The unskilled labour occupation category was significantly less important during summer and fall than during the winter and spring. Specifically, the importance of this category ranges from a low of 3.0% during the fall to a high of 10.7% during the winter.

(3) As indicated previously, the category "student" was higher during the fall than for any other season. There is no particular explanation for this occurring.

(4) The importance of the manager/owner category was over twice as great during the fall as in the spring (14.7% versus 7.1%).

TABLE III-1

NIGHTS AWAY FROM HOME ON TRIP

Number of Nights (N)	Percentage By Season				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
0	71.8	48.5	22.5	31.5	30.3
1	4.8	9.2	4.6	5.5	5.4
2	5.0	10.5	7.5	7.5	7.9
3	1.4	5.8	7.3	1.5	6.3
4	4.7	1.7	3.9	8.7	4.0
5	1.9	1.4	2.6	2.9	2.4
6	0.5	0.8	4.4	2.0	3.4
7	1.1	1.4	3.7	6.9	3.5
8 - 14	4.9	8.3	20.9	17.3	17.6
15 - 30	2.4	7.4	14.5	7.8	11.9
31 - 60	1.7	1.5	4.7	5.3	4.1
61+	0.0	3.9	3.6	2.9	3.2
Total	100.0	100.0	100.0	100.0	100.0
Average No. of Nights (All Visits)	2.2	4.1	10.0	8.4	8.4
Average No. of Nights (1 + Night Visits Only)	8.0	8.5	13.2	12.6	12.5

Note: Totals may not add to 100.0% due to rounding.

3.0 SURVEY FINDINGS - TRIP CHARACTERISTICS AND BEHAVIORS

The second major category of information gathered in relation to Waterton visitors concerned the nature of the trip itself and various associated behaviours. The purpose of this information was to provide a greater understanding of the context in which visits to Waterton are made. From a marketing perspective, it is useful to know whether or not visits to Waterton are strongly associated with other travel behaviours.

3.1 Nights Away From Home on Trip

The data in Table III-1 provides some revealing insights into the nature of the Waterton visitor market. As can be seen, nearly 32% of all visitors for the entire year were day visitors, that is, they spent no nights away from home. Nearly two-thirds (65.3%) of all visitors spent seven or less nights away from home.

The most interesting insights, however, are obtained upon examination of the data on a seasonal basis. Again, the day visitor category provides the greatest degree of contrast. As seen from Table III-1 nearly 72% of all winter visitors are day visitors as opposed to 24.4% during the summer. One of the reasons for the low proportion of overnight stays is the lack of overnight accommodation in Waterton.

The average number of nights away from home on trip (all visits) ranges from 2.2 in winter to 10.0 in summer. The range for visitors staying one or more nights is considerably smaller with an average of 8.0 nights in winter up to 13.2 nights in summer.

TABLE III-2A

NIGHTS IN ALBERTA ON TRIP

Number of Nights (N)	Percentage By Season				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
0	72.0	53.9	34.5	36.4	40.0
1	5.3	13.1	12.3	10.9	11.9
2	5.0	14.0	11.8	18.2	12.3
3	1.7	6.0	8.3	4.0	7.2
4	5.1	3.7	7.7	6.7	6.8
5	1.7	1.7	4.4	5.2	4.1
6	0.2	0.7	3.7	4.6	3.6
7	1.2	1.8	8.9	4.3	3.3
8 - 14	4.4	2.9	2.6	6.9	7.5
15 - 30	1.9	1.4	0.9	2.3	2.3
31 - 60	1.5	0.2	0.3	0.6	0.8
61+	0.0	0.5	0.4	0.0	0.3
Total	100.0	100.0	100.0	100.0	100.0
Average No. of Nights (All Visits)	2.0	2.1	3.7	3.3	3.3
Average No. of Nights (1+ Night Visits Only)	7.2	4.6	5.7	5.1	5.5

Note: Totals may not add to 100.0% due to rounding.

3.2 Nights in Alberta/Waterton on Trip

The next series of questions asked respondents to indicate the number of nights they would spend in Alberta and had spent in Waterton during the trip. Table III-2A shows that 40% of visitors indicated they would be spending no nights in Alberta. This compares with the 32% who reported they were spending no nights away from home. Thus, 8% of visitors to Waterton appear to be entering Alberta for a brief visit involving an overnight stay. The average number of nights in Alberta (all visits) ranges from 2.0 in winter to 3.7 in summer. For visitors staying one or more nights, the range is from 5.1 in fall to 7.2 in winter.

TABLE III-2B

NIGHTS IN WATERTON ON TRIP

Number of Nights (N)	Percentage By Season				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
0	92.6	70.3	54.4	61.7	59.8
1	2.2	17.0	20.3	21.5	18.9
2	1.4	9.0	11.4	8.8	10.2
3	0.4	2.8	5.3	1.6	4.3
4	0.5	0.3	2.6	0.0	1.9
5	0.4	0.0	0.4	1.3	0.4
6	0.0	0.4	0.2	0.0	0.2
7	0.0	0.0	0.6	0.0	0.4
8 - 14	1.0	0.2	3.6	4.1	2.9
15 - 30	0.1	0.1	0.5	0.8	0.5
31 - 60	1.4	0.0	0.3	0.3	0.3
61+	0.0	0.0	0.2	0.0	0.2
Total	100.0	100.0	100.0	100.0	100.0
Average No. of Nights (All Visits)	0.8	0.5	1.7	1.3	1.4
Average No. of Nights (1 + Night Visits Only)	10.4	1.7	3.7	3.5	3.5

Note: Totals may not add to 100.0% due to rounding

The data concerning nights spent in Waterton itself are summarized in Table III-2B. In this instance, it is seen that 59.8% of visitors indicated they spent no nights in Waterton. Thus 40.2% of Park visitors report that they are spending one or more nights in Waterton. Nearly half of these (18.9%) indicate a one night stay. Another 10.2% reported a two night stay with all other categories totalling just over 11%.

Again there are substantial variations by season. Nearly 93% of winter visitors spent no nights in the Park. This is not surprising since there was little overnight accommodation available in the park during the winter survey period. This compares with 61.7% of summer visitors that visited for the day only. Correspondingly, 11.4% of summer visitors spent two nights in Waterton compared with 1.4% for winter visitors.

The average length of stay in Waterton (all visits) ranges from 0.8 nights in winter to 1.7 nights in summer. Surprisingly, the average length of stay for visitors staying one or more nights ranges from 10.4 nights in winter to 1.7 nights in spring.

TABLE III-3

TIMING OF DECISION TO VISIT WATERTON

When Decision Was Made (N)	Percentage By Season				
	Winter (14,699)	Spring (43,568)	Summer (182,742)	Fall (21,050)	Annual (262,059)
Today	60.9	40.4	22.6	27.9	28.2
Within Past Week	31.9	35.5	34.8	45.0	35.6
Within Past Month	4.2	13.2	16.9	13.6	15.3
Within Past 3 Months	2.0	6.6	13.9	7.8	11.5
Within Past Year	0.5	3.7	8.9	3.8	7.2
More than 1 Year Ago	0.4	0.6	2.8	1.9	2.2
Total	100.0	100.0	100.0	100.1	100.0

Note: Totals may not add to 100.0% due to rounding

3.3 Timing of Decision to Visit Waterton

The timing of the decision to visit a destination such as Waterton is of particular importance from a marketing perspective. The most obvious implication relates to the timing of promotional efforts in major market areas. The data from this survey (see Table III-3) indicate that 28.2% of visitors made their decision to visit on the same day that they actually visited. Another 35.7% reported that they had made their decision to visit less than one week prior to the date of the visit itself. At the other extreme, 2.2% stated they had decided to visit Waterton more than a year ago.

Again, there are strong variations by season. A much higher percentage (60.9%) of winter visitors made their decision to visit on the same day as the visit itself. This contrasts with only 22.9% in this situation during the summer. Conversely, 25.6% of summer visitors reported making their decision to visit Waterton a minimum of one month prior to the visit. This compares with 2.9% in the case of winter visitors and 10.9% and 13.5% for spring and fall visitors, respectively.

A cross-tabulation of the responses to timing of decision and place of residence found visitors from farther places of origin made their decision to visit a bit earlier than visitors from Alberta. This can be attributed largely to the high percentage of American, European and other international visitors to Glacier National Park to the south that choose to visit Waterton as part of their trip to the United States.

TABLE III-4

PREVIOUS VISITATION TO WATERTON

Previously Visited	Percentage By Season				
	Winter	Spring	Summer	Fall	Annual
(N)	(14,699)	(43,568)	(182,742)	(21,050)	(262,059)
Yes	89.3	74.0	53.8	60.7	59.7
No	10.7	26.0	46.2	39.3	40.3
Total	100.0	100.0	100.0	100.0	100.0

3.4 Previous Visitation to Waterton

This part of the questioning was designed to determine the relative importance of repeat versus first time visitors to Waterton. As seen from Table III-4, nearly 60% of visitors throughout the year reported they had previously been to the Park. The variations by season were substantial. While 89.3% of winter visitors had previously visited the Park, only 53.8% of summer visitors had done so. A cross-tabulation of frequency of visitation over the past 12 months, two years and three years by place of residence found, as expected, that those living closer to the Park visited more frequently.

The subsequent question attempted to determine how long ago these visits had been made. Our interpretation of this table is not necessarily straight forward. The pattern of responses generally describes the relationship between more and less recent visitation. Generally, the highest extent of previous visitation is by winter visitors and the lowest by summer visitors.

TABLE III-5A

PRIMARY PURPOSE OF VISIT TO WATERTON

Trip Purpose (N)	Percentage By Season Winter (14,699)	Spring (43,568)	Summer (182,742)	Fall (21,050)	Annual (262,059)
Vacation	6.6	32.3	63.5	46.7	53.8
Day Use or Social Activites	78.2	55.0	27.3	39.0	35.7
Personal or Family Affair	6.4	6.4	5.7	4.1	5.8
Personal Business	2.6	4.1	1.7	1.9	2.2
Business	5.8	2.0	0.6	1.7	1.2
Attend Meeting	0.3	0.2	1.1	6.5	1.3
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

TABLE III-5B

SECONDARY REASONS FOR VISIT TO WATERTON

Secondary Purpose (N)	Percentage By Season Winter (14,699)	Spring (43,566)	Summer (182,957)	Fall (21,050)	Average (262,274)
Day Use or Social Activities	4.3	6.1	8.3	9.7	7.8
Personal Business	1.9	5.4	6.1	10.8	6.2
Vacation	4.8	5.3	2.2	9.7	3.5
Personal or Family Affair	1.9	4.1	2.5	0.8	2.6
Attend Meeting	0.0	0.2	0.3	0.0	0.3
Business	1.3	1.1	0.0	0.0	0.3
Other Reason	0.6	0.0	0.0	0.0	0.0
No Other Reason	85.4	77.8	80.8	74.6	80.1
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

3.5 Primary Purpose of Visit to Waterton

Respondents were provided with six possible categories of responses describing the primary purpose of the visit to Waterton. As seen from Table III-5A only two of these categories were of significant importance. With respect to the entire year, just 53.8% of visitors indicated they were visiting Waterton on vacation. Another 35.7% stated they were visiting the Park on a day use or social basis. All other categories comprised 10.5% of visitors.

Seasonal variations in response to this question were quite substantial, but not unexpected. As is evident, vacation visitation dominated (63.5%) during the summer season, and was held to 6.6% during the winter. Conversely, day/social usage was only 27.3% during the summer but rose to 78.2% during the winter. It is also interesting to note that of fall visitations 46.7% were for the purpose of vacation. This compared with 32.3% during the spring. It would appear the fall contains a much higher vacation component than might be expected, particularly when compared with spring visitation.

Respondents were also asked to indicate the importance of secondary reasons for visits to Waterton, using the same categories used for the previous question. As is evident in Table III-5B, secondary reasons were relatively unimportant. Over 80% of all visitors provided no secondary reason. Of those that did, the day use/social and the personal business categories were the two most important secondary reasons.

TABLE III-6

MAIN DESTINATION OF TRIP

Percentage By Season

Main Destination (N)	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
Waterton	76.2	72.3	68.9	64.5	69.5
Banff	0.0	1.6	4.3	11.1	4.1
Calgary	0.6	2.0	4.6	1.2	3.7
Jasper	0.0	3.9	4.5	2.2	4.0
Edmonton	0.4	0.7	2.5	0.8	2.0
Lethbridge	3.9	4.9	1.6	3.1	2.4
Other S.W. Alberta	18.0	4.3	5.3	9.8	6.2
Medicine Hat	0.8	0.5	0.7	0.5	0.6
Kananaskis	0.0	0.3	0.0	0.0	0.0
Lake Louise	0.0	1.1	0.6	0.8	0.7
Drumheller	0.0	0.2	0.6	0.0	0.4
Red Deer	0.1	0.0	0.2	0.0	0.2
Other Central/Northern Alberta	0.0	2.3	2.0	1.1	1.9
None	0.0	5.7	4.1	4.9	4.2
Total	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

3.6 Main Destination of Trip

The purpose of this question was to determine the extent to which Waterton was a primary or pass through destination in Alberta. The results to this question are summarized in Table III-6. As seen, on an annual basis, 69.5% of the trips were made primarily to visit Waterton itself. This percentage varied from a high of 76.2% during the winter to a low of 64.5% during the fall. Other important main destinations in Alberta were Banff (4.1%), Calgary (3.7%), and Jasper (4.0%). These results illustrate the problem with the location of Waterton relative to other major destinations. For the most part, it is remote and away from major travel routes thereby making it difficult to market cooperatively with Banff, Calgary and Jasper. On the other hand, these can be used as major marketing advantages. Waterton can be contrasted with the crowding and commercialism in Banff and Jasper. It can also be marketed as the remote getaway for Calgarians. A cross-tabulation of main destination by place of residence found Waterton, Banff, Edmonton, Calgary and Jasper to be more popular destinations for those travelling further from home.

From previous tables, it was evident that a large percentage of visits were for day use only. Since many of these visits are by residents in southern Alberta, this result is not unexpected. However, it does indicate some potential to increase overnight visits throughout the year.

TABLE III-7

FURTHEST PLACE FROM HOME VISITED ON TRIP

Percentage By Season

Main Destination (N)	Winter (14,690)	Spring (43,568)	Summer (181,560)	Fall (20,960)	Annual (260,777)
Waterton	88.1	75.8	61.5	57.2	85.0
Glacier	0.0	0.1	1.8	6.6	1.9
Cardston	1.0	0.7	0.3	0.2	0.4
Pincher Creek	2.1	3.2	0.4	0.6	1.0
Fort Macleod	0.1	0.0	0.0	0.0	0.0
Lethbridge	1.1	2.6	0.6	1.5	1.0
Other S.W. Alberta	2.3	1.0	0.8	0.2	0.9
Medicine Hat	0.0	0.0	0.2	0.3	0.2
Other S. Alberta	0.0	0.0	0.0	0.3	0.0
Calgary	0.6	1.2	2.3	1.8	2.0
Red Deer	0.0	0.0	0.5	0.0	0.3
Edmonton Metro	0.0	1.2	2.7	2.3	2.3
Other Central & North Alberta	0.4	4.7	10.5	11.9	9.1
S.W. B.C.	3.0	0.6	1.6	1.3	1.5
Vancouver Metro	0.3	0.3	1.9	2.3	1.6
Victoria	0.0	0.6	1.5	1.3	1.2
Other B.C.	0.0	1.2	2.1	0.0	1.6
Saskatoon	0.0	0.0	0.1	0.0	0.1
Other Saskatchewan	0.0	0.2	0.5	0.5	0.5
Winnipeg	0.0	0.0	0.2	0.0	0.1
Toronto Metro	0.2	0.0	0.0	0.0	0.0
Other Ontario	0.0	0.0	0.1	0.0	0.1
Nova Scotia	0.0	0.0	0.0	0.1	0.0
Newfoundland	0.0	0.0	0.1	0.0	0.1
NWT & Yukon	0.0	0.0	0.0	0.2	0.0
Kalispell, Montana	0.3	0.9	1.7	1.9	1.5
Helena, Montana	0.0	0.0	0.1	0.0	0.1
Missoula, Montana	0.0	0.1	0.2	0.4	0.2
Great Falls, Montana	0.0	0.2	0.4	0.0	0.3
Other Montana	0.2	1.7	1.7	1.3	1.6
Idaho	0.0	0.3	0.3	0.0	0.3
Washington	0.0	0.2	1.4	0.9	1.1
North Dakota	0.0	0.0	0.1	0.0	0.1
Oregon	0.0	0.0	0.6	0.0	0.4
Wyoming	0.0	0.0	0.6	1.7	0.6
California	0.0	0.0	0.1	1.4	0.2
Southwest States	0.0	0.9	1.6	0.5	1.3
West Central States	0.0	0.0	0.1	0.0	0.1
East Central States	0.0	0.4	0.1	0.0	0.1
North Eastern Seaboard	0.0	0.0	0.3	1.4	0.3
South Eastern Seaboard	0.0	0.5	0.1	0.0	0.1
Non-Contiguous States	0.0	1.3	0.7	0.5	0.7
United Kingdom	0.0	0.0	0.0	1.1	0.1
Africa	0.0	0.0	0.0	0.4	0.0
Asia/Europe	0.2	0.0	0.0	0.0	0.0
Mexico	0.0	0.0	0.1	0.0	0.1
TOTAL	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

3.7 The Furthest Place From Home Visited on Trip

Directly related to the previous question, this question was designed to provide additional insight into the importance of Waterton relative to the rest of the trip in question. This question asked individuals to report the furthest place from home they were visiting on the present trip. As the results in Table III-7 show there was no clearly consistent response aside from Waterton itself. The data thus again confirms that for the overwhelming proportion (85.0%) of the visitors to Waterton, the Park itself is the primary destination and to a large extent the place most distant from home visited by individuals.

Again, there are significant variations by season consistent with previous results. Over 88% of winter visitors indicate that Waterton is the farthest place from home visited on the present trip. This figure falls to 57.2% for fall visitors and 61.5% for summers visitors.

TABLE III-8

REPORTED ACTIVITIES BY VISITORS

Main Destination (N)	Percentage By Season				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
Visiting Glacier Park	1.9	20.8	49.8	38.8	41.4
Sightseeing by Car	85.0	81.2	86.8	91.4	86.1
Sightseeing by Bus	1.0	0.4	1.4	0.3	1.1
Walking	39.1	68.1	78.8	82.2	75.1
Jogging/Running	3.4	6.2	3.7	7.4	4.4
Shopping	2.6	38.2	63.2	29.8	52.9
Reading	4.8	17.2	24.8	25.8	22.5
Photography	34.4	43.9	57.9	62.3	54.6
Wildlife Viewing	55.8	64.2	67.8	72.3	66.9
Bird Watching	19.0	24.9	27.2	37.4	27.2
Vegetation/Flora Viewing	11.7	37.3	43.4	44.0	40.6
Special Event	0.6	2.1	5.4	2.0	4.3
Restaurant Dining	9.4	31.3	49.5	42.2	43.6
Restaurant Drinking	1.6	9.8	14.6	16.2	13.2
Dancing	0.2	0.5	1.5	0.0	1.1
Going to Movie	0.0	2.2	3.7	0.0	2.9
Resting/Relaxing	12.3	38.8	47.8	43.0	43.9
Watching TV	3.5	7.2	11.6	5.7	9.9
Swimming	0.0	2.0	7.7	0.9	5.8
Scuba Diving	0.1	0.2	0.4	0.9	0.4
Snorkeling	0.0	0.0	0.2	0.0	0.2
Tennis	0.0	0.8	1.4	3.6	1.4
Golf	0.8	1.9	4.5	1.8	3.6
Fishing	0.8	4.7	4.6	2.0	4.2
Cycling	0.2	7.3	6.3	8.3	6.3
Group Hiking/Backpacking	9.5	15.3	25.6	29.8	23.3
Naturalist Hiking/Backpacking	0.8	0.4	2.0	0.5	1.5
Horseback Riding	0.0	3.2	3.3	1.4	2.9
Interpretive Theatre	0.0	0.4	7.5	5.2	5.7
Canoeing/Kayaking	0.0	0.0	3.8	0.0	2.7
Boating	0.0	3.2	5.7	4.3	4.8
Sailing	0.0	0.0	0.1	0.0	0.0
Sailboarding	0.0	0.0	0.1	0.5	0.1
Mountaineering	2.2	3.1	1.1	0.7	1.5
Ice Climbing	1.8	0.0	0.0	0.0	0.1
Other Sports Activity	0.5	3.1	1.6	5.5	2.1
Research	0.7	0.2	0.3	5.8	0.7
Visiting Museums	0.1	11.3	18.1	14.5	15.7
Picknicking/Cookouts	12.7	23.9	24.8	22.7	23.8
Cross Country Skiing	16.5	0.0	0.0	0.0	0.9
Snowshoeing	0.9	0.0	0.0	0.0	0.1
Skating	0.2	0.0	0.0	0.0	0.0
Snowmobiling	0.3	0.0	0.0	0.0	0.0
Other Activities	1.5	0.0	0.0	0.0	0.1
No Activities	2.2	2.8	1.8	0.9	1.9

3.8 Visitor Activities

The major goal of the present study was to provide an in-depth understanding of visitor behaviour within the park itself. The first question in this regard pertained to the measurement of activities in which the visitors participated while in the park. Towards this end respondents were asked to identify (from a long list) those activities in which they had participated while in Waterton Park. Results from this question are given in Table III-8. This table shows that two activities are by far the most popular. These were:

- Sightseeing by car (86.1%)
- Walking (75.1%)

Other activities which are substantially lower yet still had high levels of participation were:

- Wildlife viewing (66.9%)
- Photography (54.6%)
- Shopping (52.9%)
- Resting/Relaxing (43.9%)
- Restaurant Dining (43.6%)
- Vegetation/Flora Viewing (40.6%)
- Visiting Glacier Park (41.4%)

There are a number of activities which are clearly influenced by weather. One would expect to find considerable variation in participation in the various activities by season, such is indeed the case. While sightseeing by car remains popular in all seasons, activities such as walking, shopping, dining, resting/relaxing to name only a few, had very different levels of participation throughout the winter, spring, summer and fall seasons.

Detailed tabulation of reported activities by other characteristics and other activities would be helpful in detailed planning for park facilities and programs.

TABLE III-9

FACILITIES/PROGRAMS USED BY VISITORS

Facility or Program	Percentage by Season				Annual Average
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	(262,274)
Hiking Trails	20.1	34.9	40.1	42.6	38.3
Interpretive/Ed. Programs	0.8	4.4	15.9	18.4	13.3
Information Centre	4.3	14.2	34.9	21.7	28.7
Riding Stables	0.0	3.0	3.3	1.4	2.9
Golf Course	1.2	1.9	5.0	1.8	4.0
Bike/Scooter Rental	0.0	4.3	5.9	5.0	5.3
Boat/Canoe Rental	0.0	2.1	4.5	3.0	3.7
Scenic Boat Tour	0.0	3.5	18.3	6.4	13.9
Church Camp	0.0	0.0	0.5	0.5	0.4
Convention Centre	0.0	0.2	0.8	0.6	0.7
Use Other Facilities/Programs	7.9	0.0	0.0	0.0	0.4
No Facilities/Programs	69.9	51.4	34.9	36.3	39.7

3.9 Facilities/Programs Used by Visitors

While certain activities may be participated in without the use of facilities or structured programs, such is not the case for others. Within Waterton Park, there currently exists a fairly extensive range of facilities and programs for use by park visitors. However, to date, the popularity as reported by visitors has not been documented.

Table III-9 documents the usage level of the various programs and facilities in the park. As shown, the most popular facilities/programs are:

- Hiking trails (38.3%)
- Information Centre (28.7%)
- Scenic Boat Tour (13.9%)
- Interpretive/Educational Programs (13.3%)

All other facilities and programs have reported usage levels which are considerably lower.

Not surprisingly, there are again considerable variations in facilities/programs usage by season. In virtually all cases, the highest reported usage levels occur during the summer season. Most of the facilities and programs are not open or available outside the summer season. The only notable exception is the high usage of hiking trails during the fall.

It appears that a greater emphasis should be placed on creating visitor awareness and improving access to riding stables, golf course and rentals. There also is an opportunity to offer more interpretive and education programs which will increase repeat visitation, especially in the spring and fall.

TABLE III-10

LOCATIONS/SITES VISITED

Location/Site	Percentage of Respondents Mentioning				
	Winter	Spring	Summer	Fall	Annual
(N)	(14,699)	(43,568)	(182,957)	(21,050)	(262,274)
Buffalo Paddocks	12.2	16.3	15.6	24.1	16.2
Prince of Wales Hotel	12.9	39.8	60.5	47.1	53.3
Cameron Falls	49.1	50.4	46.6	45.2	48.9
Cameron Lake	25.7	30.0	40.7	39.6	38.0
Kootenai Browns Grave	2.6	3.7	2.7	3.6	2.9
Red Rock Canyon	23.5	31.8	37.4	46.8	36.5
Goat Haunt	0.8	4.6	17.7	1.4	13.2
Oil City Cairn	2.0	6.5	8.4	8.5	7.7
Peace Park Pavilion	0.6	10.5	11.1	10.0	10.4
Golf Course	3.2	5.5	10.1	6.8	8.7
Heritage Centre	8.1	18.5	28.3	15.0	24.5
Marina	10.0	28.6	33.5	28.2	30.9
Visit Other	8.4	0.3	0.4	0.0	0.8
Nothing	19.2	10.0	8.5	7.1	9.2

3.10 Locations/Sites Visited

The third similar question attempted to identify those locations/sites in the park which were visited by guests. The reported results are given in Table III-10. As seen, the most popular sites were:

- Prince of Wales Hotel (53.3%)
- Cameron Falls (48.9%)
- Cameron Lake (38.0%)
- Red Rock Canyon (36.5%)
- Marina (30.9)
- Heritage Centre (24.5%)

With respect to locations/sites visited, seasonal variations were quite pronounced for the Prince of Wales Hotel and the Heritage Centre. The Prince of Wales Hotel is not open outside of the summer months but it appears many people come up to see the architecture of the structure. In contrast, these variations were less pronounced for outdoor sites such as Cameron Falls, Cameron Lake and Red Rock Canyon. To capitalize on the man-made assets, it is important to develop and implement plans for improvement of the Prince of Wales Hotel and the Heritage Centre. Extending the season of operation should be given serious consideration.

TABLE III-11

TYPE OF ACCOMMODATION USED

	Percentage by Season				
Location/Site	Winter	Spring	Summer	Fall	Annual
(N)	(714)	(12,959)	(76,563)	(6,990)	(97,226)
Hotel/Motel	38.5	37.6	49.4	44.3	47.4
Townsite Campground	3.7	23.5	28.6	41.8	28.7
Crandall Mountain Campground	0.0	19.0	14.0	5.3	13.9
Belly River Campground	0.0	1.8	0.8	1.6	0.9
Pass Creek Campground	9.8	0.0	0.8	0.8	0.7
Other Campground	0.0	0.0	0.0	0.0	0.0
Back Country Camping	0.0	4.8	0.0	0.0	0.6
Own Cottage	10.8	4.0	1.2	0.5	1.6
Home/Cottage of Friend	37.2	7.7	4.7	5.7	5.4
Rented Cottage	0.0	0.0	0.0	0.0	0.0
Use Other	0.0	0.5	1.1	0.0	1.0
TOTAL	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

3.11 Type of Accommodation Used

The first point that should be noted in this regard is that, consistent with the high level of day visitors, over 64% of all visitors did not use any form of accommodation in Waterton Lakes National Park and of those who did, the most popular form of accommodation was the hotel/motel. Across the entire year, 47.4% of all visitors reported using this type of accommodation. The variation around this average was quite substantial varying from a high of 49.4% in summer to 37.6% in the spring.

The second most popular form of accommodation was the townsite campground. On an annual basis nearly 29% of visitors reported using this form of accommodation. Again, the high point in terms of usage are the summer and fall periods (28.6% and 41.8%, respectively). The low point is naturally the winter season (3.7%).

The only other campground receiving any significant usage was the Crandall Mountain Campground at 13.9% for an annual basis. It's usage represented 6.2% of summer visitors to 0% of winter visitors. Table III-11 provides additional details concerning accommodation use.

A cross-tabulation of type of accommodation used with place of residence revealed that travellers from greater distances tend to use hotels and motels.

TABLE III-12

SOURCES OF INFORMATION INFLUENCING VISIT

Information Source (N)	Percentage by Season				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
Previous Experience	65.9	56.8	38.7	46.8	43.9
Friends/Relatives	23.5	19.1	23.4	22.1	22.6
Advertisement	0.2	0.7	0.2	0.0	0.3
Travel Article	0.0	2.8	3.8	7.9	3.7
Travel Show	0.2	0.0	0.0	0.0	0.0
Passing By Sign	0.2	0.5	0.0	0.0	0.1
Glacier Park	0.2	2.7	5.1	1.1	4.1
Alberta Travel Literature	1.3	2.4	0.8	0.0	1.0
Travel Agent	0.1	1.1	1.2	0.0	1.0
Visiting Resident	0.1	0.7	0.0	0.0	0.1
Tourist Info Centres	0.8	6.2	12.0	8.8	10.1
Other Brochure	0.9	1.3	0.6	0.0	0.7
Travel Guide	2.1	1.7	2.4	3.2	2.3
Map, Atlas	1.2	2.2	4.6	6.3	4.1
Alberta Toll Free Number	0.0	0.5	0.9	1.3	0.8
Waterton	0.9	0.0	1.2	1.5	1.0
Business	0.2	0.0	0.7	0.8	0.6
No Info Used	2.0	1.1	3.7	0.2	2.9
Don't Know	0.0	0.0	0.7	0.0	0.5
TOTAL	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

3.12 Sources of Information Influencing Visitors

From a marketing perspective, it is important to have an understanding of the sources of information influencing visitors' decisions to visit Waterton. Visitors were asked to identify the sources of information used in planning their trip to Waterton. Respondents provided the data summarized in Table III-12. It is clearly evident that the one single source of information considered to be the most important by visitors was "previous experience" (43.9%). This figure was consistently high across all seasons but was most pronounced for the winter period during which time a high percentage of visitors are from local communities.

Five other sources of information can be considered to be of some importance. They are:

- friends and relatives (22.6%)
- tourist information centres (10.1%)
- maps and atlases (4.1%)
- Glacier Park (4.1%)
- travel articles (3.7%)
- travel guides (2.3%)

A cross-tabulation by place of residence found that almost every origin of visitor received information through previous experience or friends and relatives. For most Americans, Glacier Park, tourist information centres, travel guides, maps and atlases, travel articles and travel agents were the major sources of information for their visits. Alberta travel literature, tourist information centres, travel guides and maps were significant sources of information for Alberta residents. For local markets, almost every source of information was used.

It should be noted that a small percentage (2.9%) indicated they did not use any information or did not know (0.5%) where they obtained the information used.

TABLE III-13
COMMUNITIES/ATTRACTIONS/EVENTS VISITED ON TRIP IN ALBERTA

Percentage By Season

Community (N)	Winter (5,866)	Spring (10,396)	Summer (82,499)	Fall (11,983)	Annual (110,743)
Pincher Creek	26.1	13.9	6.5	9.0	8.5
Crowsnest Pass	1.9	0.0	1.5	2.4	1.5
Cardston	39.0	16.6	17.9	11.4	18.2
Fort MacLeod	4.5	11.2	14.0	20.2	13.9
Lethbridge	23.4	12.5	19.4	12.6	18.2
Other S.W. Alberta	27.8	17.9	10.5	10.4	12.1
Medicine Hat	0.0	4.7	7.4	4.4	6.4
Other Communities in S. Alberta	3.1	2.5	0.0	0.0	0.4
Calgary	11.3	23.4	32.9	18.9	29.3
Banff	5.9	35.9	36.9	31.9	34.6
Lake Louise	0.4	7.5	19.5	15.5	16.9
Kananaskis Country	0.0	0.0	5.4	7.4	4.8
Drumheller	0.7	12.4	7.1	13.2	7.9
Red Deer	0.0	1.2	2.2	0.0	1.8
Edmonton	0.0	11.2	16.7	6.2	14.2
Jasper	0.5	25.5	22.1	18.5	20.9
Other Central/North Alberta	1.2	6.0	7.0	3.6	6.2
TOTAL *	145.8	202.4	227.0	185.6	215.9
Attractions/Events (N)	(916)	(4,646)	(42,507)	(5,683)	(53,752)
Head-Smashed-In	0.0	31.5	30.8	46.3	32.0
Remington Carriage Collection	0.0	4.1	1.1	0.0	1.3
Morman Temple	28.7	3.5	13.3	3.4	11.6
Frank Slide Interpretive Centre	41.8	14.7	7.3	10.1	8.9
Leitch Collieries	0.0	0.0	0.0	0.9	0.1
Fort MacLeod Museum	0.0	4.1	1.9	8.4	2.8
Nikka Yuko Gardens	0.0	0.0	5.1	8.2	4.9
Fort Whoop-Up	0.0	0.0	4.3	1.7	3.5
Other Attractions in SW Alberta	16.1	18.3	0.3	6.1	2.8
Brooks Field Station	0.0	0.0	0.4	0.0	0.3
Cypress Hills	1.8	0.0	4.1	0.0	3.3
Tyrrell Museum	0.0	19.2	10.2	28.9	12.8
Dinosaur Provincial Park	0.0	12.2	3.1	1.0	3.6
Heritage Park	0.0	1.4	5.3	2.3	4.5
Calgary Tower	0.0	0.0	1.4	0.0	1.1
Calgary Zoo	0.0	2.6	8.1	2.6	6.9
Other Attractions in Calgary	2.5	5.1	4.1	10.9	4.8
Legislative Building	0.0	0.0	0.4	0.0	0.3
West Edmonton Mall	7.7	10.1	18.8	6.2	16.5
Fort Edmonton Park	0.0	0.0	1.2	0.0	0.9
Provincial Museum	0.0	0.0	0.7	0.0	0.6
Columbia Icefields	0.0	6.0	9.6	6.3	8.8
Other Attractions in Central and Northern Alberta	0.0	1.7	0.5	0.0	0.6
Calgary Stampede	0.0	0.0	14.6	0.0	11.6
Klondike Days	0.0	1.0	0.9	0.0	0.8
Family Event	2.6	1.7	0.0	0.0	0.2
Convention/Meeting	0.0	2.9	0.0	0.0	0.3
Other Event in SW Alberta	1.3	1.0	3.2	0.0	2.7
Other Event in Central or Northern Alberta	0.0	1.0	0.0	0.0	0.1
TOTAL *	102.5	142.1	150.7	143.3	148.4

* Totals equal more than 100% due to multiple responses allowed.

Prior to and during the survey period, Waterton Park businesses were successful in hosting writers for articles in magazines and newspapers. This success is reflected in the response to travel articles. The results show a good opportunity to increase visitation by improving the distribution of print material and undertaking cooperative marketing programs with Glacier National Park and Montana Travel. Above all, the results show how important a good experience in the park is required to get repeat visitation.

3.13 Other Communities/Attractions/Events Visited on Trip

From a tourism planning standpoint, it is useful to be able to identify linkages which occur between and among the various destinations within a region. In this particular case, the objective is to identify the relationship which exists between visits to Waterton Lakes National Park and other communities, events and attractions in Alberta.

With this in mind, one question asked respondents to identify other communities they had visited or planned to visit on the current trip in Alberta. The distribution of responses to this question is summarized in Table III-13. The most popular other communities visited were Calgary, Banff and Jasper. However, nearly 58% of the respondents did not visit other communities in Alberta.

Respondents were also asked to identify any specific attractions or events in Alberta that they have visited or planned to visit during their trip. Responses to this question are shown in Table III-13. The most popular other attractions and events were Head-Smashed-In Buffalo Jump, West Edmonton Mall, Tyrrell Museum, Mormon Temple, Calgary Stampede and Frank Slide Interpretive Centre. However, only 20.5% of the respondents visited other attractions and events in Alberta. This result reflects the high percentage of day visits and those with Waterton as their only destination.

The existing travel linkages and patterns between Waterton and communities, attractions and events in Alberta can be more fully developed through cooperative marketing, packaging and development of auto tour routes.

TABLE III-14

EQUIPMENT CARRIED BY WATERTON VISITORS

Type of Equipment (N)	Percentage by Season				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
Still Camera	60.4	64.0	78.8	70.1	74.6
Movie Camera	1.1	2.3	1.6	1.6	1.7
Video Camera	1.5	1.3	3.9	8.5	3.7
Binoculars	29.4	31.6	39.0	49.9	38.1
Field Guide	5.0	7.6	14.3	17.4	12.9
Boat	1.0	8.5	5.5	0.7	5.4
Canoe/Kayak	0.1	0.9	2.2	0.6	1.8
Motorcycle	0.9	0.7	1.2	0.5	1.1
Bicycle	1.1	7.9	7.7	7.2	7.3
Tent	2.9	8.9	16.2	14.1	14.1
Hiking Boots	13.7	13.6	19.8	24.2	18.8
Back Packing/Camping	7.8	6.0	10.2	15.6	9.8
Fishing Gear	4.0	14.9	18.2	5.6	15.8
Snorkeling/Scuba Gear	0.4	0.4	1.2	0.0	0.9
Golf Clubs	1.4	6.3	10.4	2.8	8.6
Sailboard	0.7	0.0	0.5	0.5	0.5
X-Country Skis	18.5	0.0	0.0	0.4	1.1
Snowmobile	0.4	0.0	0.1	0.0	0.1
Downhill Skis	3.2	0.2	0.0	0.0	0.2
Snowshoes	2.1	0.2	0.0	0.1	0.2
Other Equipment	4.2	0.0	0.0	0.0	0.2
No Equipment	20.9	19.4	10.6	17.7	13.2

3.14 Equipment Carried By Waterton Visitors

Another area of interest to both marketers and tourism planners concerns the type of equipment carried by park visitors. Respondents were asked to identify (from a list) those items which were available to them for use on the present trip. The distribution of responses for all visitors is given in Table III-14.

The most popular items carried by visitors (in order of importance) were:

- still camera (74.6%)
- binoculars (38.1%)
- hiking boots (18.8%)
- fishing gear (15.8%)
- tent (14.1%)
- field guides (12.9%)
- backpacking/camping equipment (9.8%)
- golf clubs (8.6%)

It is also of interest to note that over 13% of all visitors reportedly brought no equipment at all.

Seasonal variations were again pronounced in certain cases. Obvious variations occurred in cases such as that of fishing gear, tents, golf clubs and boats. Differences were much less pronounced in the case of items such as binoculars, hiking boots and backpacking/camping gear.

As more travellers from greater distances are drawn to the park, it will be important to offer rental or use of some of the most popular equipment.

TABLE IV-1

ATTRACTION/FACTORS INFLUENCING DECISIONS TO VISIT WATERTON

Attraction or Influencing Factor (N)	Percentage of Respondents Mentioning				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,052)	Annual (262,274)
Personal Reasons	11.8	12.6	4.2	2.6	5.9
Business	7.0	3.8	1.3	1.3	2.0
Visit Friends/Relatives	8.7	9.5	7.5	4.4	7.6
Close Cabin	1.6	2.1	1.4	1.5	1.5
See the Park	3.2	5.5	17.5	11.9	14.2
Like Area	4.0	6.8	4.1	1.4	4.3
Scenery	8.7	12.3	7.9	15.6	9.3
Mountains	8.6	5.7	4.4	2.9	4.8
Lakes	1.0	0.7	1.8	0.5	1.5
Wildlife	13.4	5.4	1.8	6.6	3.4
Hiking	0.5	1.5	2.8	3.4	2.5
See Nature	0.8	3.4	0.7	8.4	1.8
Sports	13.7	5.4	3.6	1.9	4.3
Quiet and uncrowded	0.2	3.3	0.8	1.1	1.2
Recommended by someone	4.7	9.5	15.6	19.1	14.2
Convenient Location	12.0	14.9	7.2	8.4	8.8
Ad, Article, Brochure	0.1	5.3	4.5	2.1	4.2
Regular Return Visit	16.3	14.4	24.5	30.9	22.9
Relaxation, Spend Time	11.2	3.1	3.0	3.9	3.6
Enjoy Nice Day	7.4	2.2	1.2	1.5	1.7
In Glacier Park	0.0	2.3	12.0	5.2	9.1
See Prince of Wales Hotel	0.2	1.1	3.1	2.4	2.6
Nothing in Particular	0.0	0.0	0.3	0.0	0.2

4.0 VISITOR VIEWS CONCERNING WATERTON

The previous two sections dealt respectively with the characteristics of the visitors and the characteristics of their trips. The data in this section will attempt to provide some understanding and insight into the perceptions and reactions of Waterton Lake National Park visitors.

4.1 Factors Influencing Decision to Visit Waterton

The first in this series of questions responded to factors which influenced the decision or attracted visitors to Waterton. The responses to this open ended question were summarized in Table IV-1. Across all seasons covered by the study, the most important influences were in the order of importance the following:

- regular return visitation (22.9%)
- simply to "see the park" (14.2%)
- recommended by someone (14.2%)
- the scenery (9.3%)
- convenient location of the park (8.8%)
- near Glacier Park (9.1%)
- to visit friends/relatives (7.6%)

In regard to the above, it should be noted that the particular categories established were somewhat arbitrary. For example, it would have been possible to combine scenery, mountains and lakes into one category, thus increasing the apparent importance of this influence. However, it was felt responses should be reasonably segregated to provide maximum flexibility in the use of the information for future planning and decision making.

These results show a great opportunity to improve marketing activities. Only 4.2% were influenced by an ad, article or brochure.

TABLE IV-2

OVERALL SATISFACTION WITH VISIT

Satisfaction Rating (N)	Percentage by Season				
	Winter (14,699)	Spring (43,568)	Summer (182,816)	Fall (21,050)	Annual (262,133)
Poor	2.1	0.3	0.2	0.9	0.4
Fair	9.4	5.2	2.0	2.2	2.9
Good	34.4	20.9	14.1	6.7	15.8
Very Good	33.8	39.6	45.7	45.6	44.0
Excellent	20.4	33.9	38.1	44.6	36.9
TOTAL	100.0	100.0	100.0	100.0	100.0

Note: Totals may not add to 100.0% due to rounding.

The factors influencing the decision to visit Waterton showed substantial seasonal variation in some cases. Some of the clear examples of such variation occurred in the case of:

- Sports which was an important factor for winter visitors but relatively unimportant during the rest of the year.
- Recommendations from others which were relatively unimportant for winter and spring visitors but much more important for summer and fall visitors.
- "To see the Park". This influencing factor was strongest during the summer and much less important during the winter season.
- The viewing of wildlife exerted the strongest influence during the winter and fall. It was relatively unimportant during the summer. This probably reflects the interests of those types of people that visit during the winter and fall. It also indicates a marketing opportunity in spring and summer especially since wildlife is easier to spot in Waterton than in Banff or Jasper.
- The desire to relax was a major attraction for winter visitors and a relatively unimportant one for spring, summer and fall visitors.

A cross-tabulation of factors influencing decisions with place of residence found that local residents more often visited for personal and business reasons. Surprisingly, the attraction/factors influencing decisions to visit did not vary considerably by place of residence. For instance, some overseas visitors were influenced by recommendations from others and making a regular return visit. For residents of eastern Canada, very few influencing factors were identified.

4.2 Overall Satisfaction With Visit

Responses to this question revealed a generally very favorable reaction by visitors. As shown in Table IV-2, 80.9% of the visitors over the year rated their Waterton experience as excellent or very good. Nearly 97% of the visitors judged their experience to be excellent, very good or good. Only 3.0% of visitors felt that they had only a fair or poor experience.

TABLE IV-3

WHAT VISITORS LIKED MOST ABOUT WATERTON

Aspects Liked Most (N)	Percentage of Respondents Mentioning				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
Everything	1.4	2.6	2.2	2.7	2.2
Quiet, Relaxing	11.8	12.5	11.8	18.7	12.5
Scenery, View	36.0	54.9	55.0	54.5	53.9
Wildlife	34.8	32.2	21.8	28.6	24.8
Mountains	12.8	12.3	10.2	12.6	10.9
Snow	7.1	0.0	0.4	0.3	0.7
Weather	14.7	10.9	11.8	11.5	11.8
Lakes	4.3	7.7	6.6	9.1	6.9
Flowers	0.0	1.3	3.9	5.4	3.4
Not Crowded	6.1	4.2	3.0	11.1	4.0
Nature, Natural	3.7	6.7	3.0	8.1	4.1
Clean, Fresh	2.3	6.6	5.1	4.4	5.1
Not Commercialized	1.6	0.1	2.4	2.2	2.0
Trees, Forest	0.4	1.7	0.9	9.7	1.7
Skiing	9.6	0.0	0.0	0.0	0.5
Hiking	1.4	5.9	8.0	4.7	7.0
Golf Course	0.7	1.8	2.1	1.0	1.9
Boat Cruise	0.0	0.6	3.9	0.5	2.9
Swimming	0.0	0.0	1.0	0.0	0.7
Fishing	0.4	0.1	0.9	0.0	0.7
Camping	0.0	4.2	3.1	1.3	2.9
Cameron Falls	7.2	3.6	2.6	1.5	2.9
Cameron Lake	1.0	2.0	3.5	0.4	2.8
Red Rock Canyon	0.5	0.0	1.9	2.6	1.5
Prince of Wales Hotel	0.4	2.6	5.2	3.4	4.3
Other Hotels	0.8	0.2	0.5	0.0	0.5
Architecture	0.2	0.7	0.2	0.0	0.2
Shopping	0.0	0.8	1.6	0.6	1.3
Food, Restaurants	0.7	4.4	4.0	4.7	3.9
Nature Interpret. Program	0.0	0.0	0.5	0.0	0.4
Downtown Area	0.0	0.6	1.5	0.0	1.1
Town Itself	1.3	0.5	3.0	2.5	2.5
Activities for Children	0.6	0.7	0.2	0.0	0.3
People in Park	5.6	7.1	7.2	2.0	6.7
Service Received	0.6	1.9	0.5	0.0	0.7
Nothing Particular	3.7	2.9	1.0	0.2	1.4

As for seasonal variation, it is seen that satisfaction levels are highest among those visiting during the fall. During this period, 89.6% of visitors judged their experience to be either excellent or very good. The corresponding figure for the summer period was 83.5%. For the spring season it was 72.5% and for the winter only 53.8%. Particular attention should be paid to making improvements for the visitor experience in the winter.

4.3 What Visitors Liked Most

This was again an open ended question to which visitors were asked to identify those aspects of Waterton which they enjoyed the most. Responses to this question are summarized in Table IV-3. As can be seen, a very long list of items was identified with the most frequently mentioned items as follows:

- scenery and view (53.9%)
- the wildlife (24.8%)
- the quiet relaxing atmosphere (12.5%)
- the weather (11.8%)
- the mountains (10.9%)
- hiking (7.0%)
- the lakes (6.9%)
- the people in the park (6.7%)

While there were a number of seasonal variations in the importance of the aspects liked most by the visitors, these variations did not appear to be as pronounced as one might have expected based on responses to other questions. For example, while summer visitors did not rate wildlife as a major factor in influencing their decision to visit Waterton, they did consider it to be one of the aspects of the Park they liked most. The mountains were consistently rated highly as one of the aspects most liked by visitors in all seasons. Surprisingly, the weather was also judged similarly for all four seasons.

TABLE IV-4

WHAT VISITORS LIKED LEAST ABOUT WATERTON

Aspects Liked Least (N)	Percentage of Respondents Mentioning				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
Wind	25.1	16.3	7.5	7.1	9.9
Weather	7.3	13.8	13.6	3.0	12.4
Not Open	26.0	7.6	2.1	21.5	5.9
No Wildlife	5.4	0.1	1.2	2.4	1.4
Poor Experience	2.6	5.2	2.9	3.0	3.2
Poor Service	0.4	0.9	1.0	5.8	1.4
Condition of Facilities	2.4	2.2	0.4	0.8	0.8
Personal Problem	5.5	6.5	7.4	5.3	7.0
Roads	4.0	3.5	3.2	2.7	3.2
Lack of Regulations	0.0	1.2	0.9	0.0	0.8
Lack of Stores, Service	0.0	0.0	1.2	0.0	0.8
Lack of Facilities	0.6	3.9	3.5	0.9	3.2
Lack of Information	0.2	0.5	0.6	0.0	0.5
Lack of Activities	0.9	0.0	0.3	0.0	0.3
High Prices - General	0.0	2.5	5.8	12.2	5.5
High Prices - Food	0.0	0.8	0.9	0.0	0.8
High Prices - Services	0.0	0.2	0.3	0.0	0.2
High Prices - Goods	0.0	0.0	0.9	0.5	0.7
No Accommodation	0.0	0.0	2.0	0.0	1.4
Poor Food	0.3	1.0	2.5	1.5	2.1
Poor Accommodation	0.3	1.6	2.6	1.7	2.3
Construction	1.4	8.9	0.5	0.0	1.9
Encountered Hazard	0.3	0.1	0.1	0.0	0.1
Not Clean	0.1	0.6	0.5	2.9	0.7
Encountered Wildlife	0.0	0.4	0.8	1.4	0.7
Insects	0.0	0.8	2.6	1.2	2.0
Crowded	0.0	0.0	2.7	1.7	2.0
Nothing in Particular	26.5	31.3	40.3	35.2	37.7

4.4 What Visitors Liked Least

Table IV-4 shows that while over a third of all visitors (37.7%) indicated there was nothing in particular they disliked about Waterton, there were a number of aspects which were mentioned. These included in order of importance the following:

- the weather (12.4%)
- the wind (9.9%)
- park facilities and services were not open (5.9%)
- high prices in general (5.5%)

It should be noted, however, that the number of negative factors mentioned per person was substantially lower than the aspects which were liked with the ratio being almost two likes for every dislike.

Seasonal variations were very apparent for the major negative aspects of the Park. As might be anticipated the complaints concerning the weather were highest during the winter. Those concerning the park not being open were highest during the winter and fall seasons. Complaints concerning prices were most notable during the fall season.

TABLE IV-5

SPECIAL ASPECTS OF WATERTON THAT DIFFERENTIATE IT FROM OTHER PARKS

Special Aspect (N)	Percentage of Respondents Mentioning				
	Winter (14,699)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,274)
Scenery, Views	15.9	21.6	19.3	21.6	19.7
Location, Proximity	24.5	17.1	6.9	11.1	9.9
Not Crowded	15.3	12.0	11.2	8.0	11.3
Not Commercialized	20.8	15.7	15.2	18.8	15.9
Mountains	11.0	11.8	12.6	15.7	12.6
Lakes, Water	6.4	8.3	8.9	8.6	8.6
Wildlife	13.8	14.8	11.0	15.6	12.1
Cleanliness	1.9	7.5	5.7	2.8	5.6
Openness	0.6	0.3	1.1	0.0	0.8
Nature, Natural	3.4	4.4	6.3	8.8	6.0
Quiet, Relaxing	6.1	8.7	8.9	6.9	8.6
Geography, Geology	3.0	3.7	4.3	13.5	4.9
Personal Reasons	9.0	5.2	2.5	3.2	3.3
Hiking, Skiing, Trails	4.1	6.2	4.7	6.8	5.1
Boat Cruise	1.5	0.6	1.8	0.5	1.5
Golf Course	1.0	1.3	0.3	0.6	0.5
Camping	0.0	0.0	0.7	1.1	0.6
Flowers	0.0	0.0	0.4	0.0	0.3
Prince of Wales Hotel	0.9	2.1	5.6	4.4	4.6
Peace Park	0.7	0.4	1.3	1.9	1.2
Cameron Falls	0.4	0.7	0.6	1.7	0.7
Cameron Lake	0.5	0.0	0.5	0.0	0.4
Red Rock Canyon	0.0	0.0	0.8	1.2	0.6
Lots to Do and See	5.1	3.6	3.0	1.1	3.1
Hospitality, Friendliness	3.8	4.1	4.7	5.7	4.6
Size, Smaller	8.2	8.3	9.2	8.9	8.9
Downtown	0.0	0.0	0.6	1.0	0.5
In Canada	0.0	0.0	4.3	0.5	3.1
Nothing in Particular	11.0	8.7	11.2	9.3	10.7

4.5 Special Character of Waterton

The next series of questions asked respondents to identify any dimensions of Waterton they felt differentiates it from any other park they have visited. The purpose of this line of questioning was to determine or understand any special character that visitors might perceive to be present in Waterton or describe the Waterton experience. Surprisingly, a broad range of responses resulted (See Table IV-5). The most important of these were:

- scenery and views (19.7%)
- Waterton is not commercialized (15.9%)
- the mountains (12.6%)
- the park is not crowded (11.3%)
- the wildlife (12.1%)
- convenient location and proximity (9.9%)
- the quiet relaxing atmosphere (8.6%)
- smaller size of the park (8.9%)
- the lakes and water (8.6%)

Again, seasonal variations were present but not as pronounced as might have been anticipated. Some of the greatest variations were in the following areas:

- the location and proximity as mentioned by winter visitors
- the lack of crowding as mentioned by winter visitors
- the non-commercialization as mentioned by winter and fall visitors

TABLE IV-6

VISITOR SUGGESTIONS FOR IMPROVEMENTS TO WATERTON

Suggested Improvements (N)	Percentage of Respondents Mentioning				
	Winter (14,682)	Spring (43,568)	Summer (182,957)	Fall (21,050)	Annual (262,258)
More Camping Facilities	6.6	5.7	5.8	3.3	5.6
More Hotel Facilities	0.3	0.6	2.4	0.4	1.8
More Stores and Services	1.2	0.6	1.7	0.4	1.4
More Restaurants	1.0	2.8	2.8	0.5	2.5
Better Camping Facilities	2.7	8.1	7.9	5.3	7.4
Better Hotel Facilities	0.3	0.4	1.2	2.2	1.1
Better Stores, Services	0.5	0.4	1.1	0.0	0.9
Better Restaurants	2.1	1.5	1.8	2.0	1.7
More Places Open	21.5	4.5	1.5	14.4	4.2
Lower Prices - Camping	0.0	0.3	0.1	0.0	0.1
Lower Prices - Hotel	0.4	0.8	0.3	0.0	0.3
Lower Prices - Stores	0.9	0.2	1.2	0.0	0.9
Lower Prices - Restaurants	2.2	0.8	0.8	0.0	0.8
Better Signage	0.5	2.8	3.0	7.6	3.2
More Parking	0.3	1.6	0.9	0.0	0.9
Better Roads	1.4	0.7	2.5	1.0	2.0
More Roads	2.0	0.9	0.4	0.0	0.6
More Information Programs	0.0	1.2	1.3	1.4	1.2
Better Interpretive Programs	0.0	0.4	0.4	0.0	0.3
More Trails	2.8	2.9	0.7	0.2	1.2
Better Trails	2.7	0.5	0.7	0.0	0.7
Transportation Services	0.2	1.4	0.3	0.2	0.4
Maps of Trails	1.0	0.5	0.7	5.7	1.1
Maps of Area	0.0	0.6	0.6	0.0	0.5
Clean Deadfall	0.7	0.1	0.1	0.0	0.1
Stock Lakes with Fish	1.1	1.1	1.0	0.0	0.9
More Facilities, Activities	7.3	11.0	9.8	6.1	9.6
More Children's Activities	1.8	0.3	1.1	1.0	1.0
Control on Growth	4.7	1.8	2.5	7.6	2.9
More Growth	0.5	1.0	0.4	0.8	0.5
Nothing in Particular	47.0	54.6	55.8	52.6	54.8

4.6 Visitor Suggestions for Improvement

The final question in this series asked visitors to provide suggestions concerning attractions, facilities or services that they felt were needed in the park to improve the Waterton experience. Responses to this open ended question have been coded and summarized in Table IV-6. Perhaps the most striking aspect of this table is that 54.8% of visitors could identify nothing in particular that they felt needed to be improved. Some of the most often suggested improvements were as follows:

- more or better camping facilities (13.0%)
- more facilities and activities (9.6%)
- have more places open (4.2%)

With respect to seasonality, the most pronounced variation occurred in relation to the suggestion to keep more places open. This ranged from a low of 1.8% during the summer to a high of 21.5% during the winter. In other areas of suggestion, there was a reasonable level of concensus across seasons.

TABLE V-1

WATERTON VISITOR EXPENDITURES

BY EXPENDITURE CATEGORY

Expenditure Category (N)	Average Expenditures Per Vehicle *				
	Winter (6,604)	Spring (20,019)	Summer (80,870)	Fall (10,189)	Annual (117,683)
Meals and refreshments in restaurants and hotels	$ 2.58	$ 13.92	$ 26.10	$ 14.13	$ 21.67
Groceries and beverages bought in stores	0.37	3.81	6.25	3.26	5.24
Accommodation	1.95	9.37	27.30	10.61	21.38
Gas & oil	0.29	1.96	3.61	0.99	2.92
Auto maintenance and repairs	0.00	0.16	0.53	0.29	0.39
Park entrance fees and licenses	0.00	3.57	3.59	2.24	3.27
Recreation and entertainment	0.19	2.17	7.29	2.09	5.57
Conference or convention registration fees	0.00	0.14	0.55	0.58	0.46
Retail store purchases	0.27	6.15	17.02	6.79	13.34
All other goods and services	0.07	0.24	1.17	0.64	0.90
TOTAL EXPENDITURE/VEHICLE	$ 5.73	$ 41.48	$ 93.40	$ 41.36	$ 75.14
Average No. of Persons Per Vehicle	2.71	2.75	2.81	2.35	2.75
TOTAL EXPENDITURE/PERSON	$ 2.11	$ 15.08	$ 33.24	$ 17.60	$ 27.32
Average No. of Nights (All Visits)	0.8	0.5	1.7	1.3	1.4
TOTAL EXPENDITURE/NIGHT (All Visits)	$ 2.64	$ 30.16	$ 19.55	$ 13.54	$ 19.51

* Expenditures based on responses concerning expenditures by all persons in a vehicle.

5.0 VISITOR EXPENDITURES

The last major category of information gathered from Waterton Park visitors concerns the expenditures while in the park. Information in this regard was gathered for all individuals in the vehicle.

Expenditures per vehicle per visit by season and the entire year are presented in Table V-1. Some of the major conclusions to be derived from this table are as follows:

- Across the entire year, the majority of expenditures were as follows:
  - meals and refreshments in restaurants and hotels - $21.67 per vehicle per visit
  - accommodation - $21.67 per vehicle per visit
  - retail store purchases - $13.34 per vehicle per visit

- Total expenditures for the year, based on 118,112 vehicles (or travel parties) were $8.9 million. This amount is calculated on the basis of travel party or vehicle per visit for each season as shown below.

- Expenditures per vehicle varied dramatically by season, during the winter average total expenditure per vehicle was only $6.20. During the summer this rose to a high of $93.40. The average for the entire year was $75.14

The calculation for annual expenditure is as follows:

Season	# Vehicles	$ Per Visit	$ Total
Winter	6,604	5.73	37,841
Spring	20,155	41.48	836,029
Summer	81,164	93.40	7,580,718
Fall	10,189	41.36	421,417
Annual	118,112	$ 75.14	$ 8,876,005

TABLE V-2

WATERTON VISITOR EXPENDITURES

BY AMOUNT OF EXPENDITURE

Total Expenditure/ Vehicle * (N)	Percentage of Vehicles				
	Winter (6,604)	Spring (20,019)	Summer (80,589)	Fall (10,189)	Annual (117,402)
0	82.9	18.3	6.0	22.6	13.8
$ 1 - 5	6.0	15.1	9.3	8.1	10.0
$ 6 - 10	3.2	11.6	6.9	9.1	7.7
$ 11 - 25	4.2	18.6	17.7	22.9	17.6
$ 26 - 50	1.2	13.7	14.7	10.9	13.5
$ 51 - 100	1.2	11.5	15.2	12.7	13.6
$101 - 250	1.0	8.9	19.9	13.2	16.4
$251 - 500	0.0	2.0	8.5	0.5	6.3
> $500	0.2	0.4	1.7	0.0	1.2
TOTAL	100.0	100.0	100.0	100.0	100.0

* Responses were recorded and coded in whole dollar amounts only.

Note: Totals may not add to 100.0% due to rounding.

Table V-2 shows the distribution of expenditure by amount categories. The $11-25 category applied to 17.6% of the travel parties. Only 13.8% of the travel parties spent nothing compared to 7.5% that spent over $250.

TABLE V-3

WATERTON VISITOR EXPENDITURES BY PLACE OF RESIDENCE (CATEGORY)

Geographic Origin	Percentage by Geographic Origin Expenditures Per Vehicle Per Visit									
	$0	$1-5	$6-10	$11-25	$26-50	$51-100	$101-250	$251-500	> $500	Total
(N)	(16,250)	(11,765)	(9,006)	(20,628)	(15,809)	(15,920)	(19,244)	(7,340)	(1,434)	(117,402)
Southern Alberta	24.6	13.9	11.5	19.4	12.7	8.7	5.9	2.7	0.6	100.0
Calgary	9.6	7.4	3.0	15.1	9.7	21.8	24.0	7.4	1.9	100.0
Edmonton Metro	14.0	1.0	2.2	10.5	16.9	22.7	22.1	7.3	3.1	100.0
Central/Northern Alberta	5.7	8.3	8.3	14.2	7.8	15.5	30.0	7.9	0.4	100.0
British Columbia	19.4	5.3	8.7	21.6	11.4	12.3	11.4	10.6	0.0	100.0
Saskatchewan	7.6	3.1	5.5	6.9	21.3	25.4	22.9	6.3	0.0	100.0
Manitoba	16.1	10.7	13.7	9.4	3.7	0.0	31.7	12.6	0.0	100.0
Ontario	8.2	5.0	7.7	17.8	7.3	24.6	18.8	10.5	0.0	100.0
Quebec	0.0	4.4	0.0	37.9	0.0	0.0	57.7	0.0	0.0	100.0
Other Canada	0.0	0.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	100.0
Montana	3.6	22.1	4.3	25.9	14.3	10.4	14.1	4.4	1.0	100.0
Other Northwest States	3.5	10.1	6.2	20.7	16.2	17.4	18.2	7.5	0.0	100.0
California	3.1	4.7	6.7	13.7	25.4	9.4	32.7	4.3	0.0	100.0
Other Southwest States	10.0	4.8	9.0	23.9	17.4	9.4	22.6	2.9	0.0	100.0
Western Seaboard States	4.2	10.0	5.6	14.5	17.5	13.9	17.7	12.4	4.1	100.0
East Central States	0.6	3.0	4.4	8.0	20.5	15.5	36.4	9.7	2.1	100.0
North Central States	9.9	11.1	8.5	9.3	5.5	11.1	26.4	17.2	0.8	100.0
South East States	0.0	2.3	0.0	34.6	2.1	20.2	23.0	10.0	7.9	100.0
Non-Contiguous States	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	100.0
United Kingdom	3.7	9.9	0.0	7.2	0.0	38.0	0.0	19.9	21.3	100.0
Europe	17.9	4.7	6.9	0.0	16.7	40.9	0.0	12.9	0.0	100.0
Japan	0.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0
Australia/New Zealand	17.5	0.0	0.0	29.7	32.0	0.0	20.8	0.0	0.0	100.0
Mexico & South America	0.0	31.5	0.0	0.0	0.0	68.5	0.0	0.0	0.0	100.0

Note: Totals may not add to 100.0% due to rounding.

In the cross-tabulation of visitor party expenditures in categories by place of residence, as shown in Table V-3, no strong relationship was identified. It appears, however, smaller expenditures were made by local travel parties. At the same time, many of the local visitor parties spent large amounts. Table V-4 presents the results of a cross-tabulation of average expenditure by place of residence. An estimate of total annual expenditures is also provided. On a per visit basis, the biggest spenders per visit were from:

- Non-Continguous States ($363.00)
- United Kingdom ($274.91)
- South East States ($158.75)
- Western Seaboard States ($133.15)
- East Central States ($119.80)
- North Central States ($108.48)
- Edmonton ($106.75)

In terms of total expenditures, the most significant markets were:

- Southern Alberta ($1,682,494)
- Calgary ($1,040,433)
- East Central States ($626,913)
- Edmonton ($515,698)
- Central/Northern Alberta ($495,630)
- California ($479,350)
- South East States ($454,667)
- Montana ($448,664)
- Other Northwest States ($443,295)

TABLE V-4

WATERTON VISITOR EXPENDITURES BY PLACE OF RESIDENCE (AVERAGE)

Geographic Origin	Average Expenditures Per Vehicle Per Visit [1]					Total Estimated Annual Expenditures [2]	% of Total
	Winter	Spring	Summer	Fall	Annual		
(N)	(6,604)	(20,019)	(80,589)	(10,189)	(117,402)	(118,112)	
Southern Alberta	$ 2.54	$ 24.84	$ 56.15	$ 20.58	$ 38.98	$ 1,682,494	19.0
Calgary	31.36	53.46	115.34	88.13	94.91	1,040,433	11.7
Edmonton Metro	4.22	106.76	129.36	43.94	106.75	515,698	5.8
Central/Northern Alberta	6.41	152.26	93.52	36.55	88.93	495,630	5.6
British Columbia	0.89	42.11	107.38	19.19	65.49	285,343	3.2
Saskatchewan	16.11	0.00	101.20	40.33	91.49	270,984	3.1
Manitoba	52.21	74.35	103.79	113.78	97.79	104,150	1.2
Ontario	0.00	36.89	116.42	39.75	96.58	198,561	2.2
Quebec	5.00	0.00	73.28	0.00	68.59	17,627	0.2
Other Canada	0.00	0.00	15.00	0.00	15.00	1,060	0.0
Montana	0.00	42.05	69.10	6.13	63.69	448,664	5.1
Other Northwest States	0.31	32.93	88.36	51.78	79.73	443,295	5.0
California	0.00	102.88	89.62	75.10	89.00	479,358	5.4
Other Southwest States	0.00	64.45	66.21	78.57	66.80	321,569	3.6
Western Seaboard States	5.00	97.88	137.08	233.00	133.15	785,956	8.9
East Central States	0.00	60.30	126.32	96.50	119.80	626,913	7.1
North Central States	0.00	3.00	114.02	96.37	108.48	299,070	3.4
South East States	0.00	129.25	173.19	19.99	158.75	454,667	5.1
Non-Contiguous States	0.00	0.00	363.00	0.00	363.00	74,778	0.8
United Kingdom	0.00	12.00	345.72	3.00	274.91	179,241	2.0
Europe	0.00	37.85	105.55	10.69	77.35	84,693	1.0
Japan	0.00	10.00	0.00	0.00	10.00	620	0.0
Australia/New Zealand	0.00	43.76	62.87	7.46	43.51	14,682	0.2
Mexico & South America	0.00	3.00	88.00	0.00	61.20	11,689	0.1
Origin Unknown						38,831 [3]	0.4
					Total	$ 8,876,005	100.0%

Note: Totals may not add to 100.0% due to rounding.

1 Responses were recorded and coded in whole dollar amounts only.

2 Average expenditure times the estimated number of vehicles by place of origin.

3 Estimate for other vehicles that did not indicate their expenditures based on total annual expenditures calculation on page 34.

6.0 CONCLUDING REMARKS

The Waterton Exit Survey provides an excellent data base for tourism planning and marketing for Waterton Lakes National Park. It provides a basis to estimate the volume and structure of total visitation to the Park during the survey period, a socio-demographic profile of visitors including their travel/trip characteristics and behaviours and the level and nature of their expenditures, and a monitor of their satisfaction/dissatisfaction with their visit to the Park. The highlights of the Exit Survey findings are as follows:

1. Overall, southern Alberta is the most significant existing market for Waterton Lakes National Park at 34.9% of total visitation. Calgary is second at 9.2%. Americans comprise 34.3% of all visitors with California, Montana and the northwestern States being the most significant markets. It would appear that these existing markets provide excellent potential for further growth and should be the focus of Waterton's marketing efforts over the next few years.

2. Family and relatives travelling together was the most significant travel party visiting Waterton Lakes National Park. The "couple" was the second most significant travel party, especially in the fall. It would appear that there is an excellent marketing opportunity to sell more "couples getaways" to Waterton, especially during the spring and fall periods, special family packages during the summer and shoulder seasons and wildlife viewing and photography packages in winter, spring and fall.

3. The Waterton visitor is quite well educated with higher than average personal and household incomes. Nearly 19% of the visitors surveyed were retired, with professional, homemaker, technical, clerical, sales and manager/owner occupations being the most significant other occupations.

4. Nearly two-thirds of all visitors spent seven or less nights away from home on their trips which included a visit to Waterton. Nearly 60% visited Waterton for a day. The average annual length of stay for all visits is 1.4 nights. There is an excellent opportunity to convert some of the day users into overnight stays especially during the spring and fall seasons.

5. Nearly two-thirds of all visitors surveyed made their decision to visit Waterton within one week of their arrival. This is not surprising since many of the visitors were coming from Glacier National Park in the United States and from southern Alberta. It also indicates that there is a great opportunity to increase visitation by travellers passing through southern Alberta and Glacier National Park.

6. The primary trip purpose of visitors was vacation (53.8%). Nearly 36% visited the Park for day use recreation or social activities. The existing convention and meeting market is very small and certainly has considerable potential to increase,especially for associations and corporations wanting to meet in a remote yet accessible location.

7. Waterton is in itself a major destination for visitors. Nearly 70% of the trips were made primarily to visit Waterton itself. Other important destinations were Banff, Calgary and Jasper. From a marketing perspective, Waterton should pursue cooperative promotions with Banff, Calgary and Jasper.

8. The most popular visitor activities were sightseeing by car and walking. Other significant activities were wildlife viewing, photography, shopping, resting/relaxing, restaurant dining, vegetation/flora viewing and visiting Glacier National Park in the United States.

9. The most popular facilities and programs in the Park were hiking trails, the information centre, the scenic boat tour and interpretive/educational programs. The most popular sites and locations visited in the Park were the Prince of Wales Hotel, Cameron Falls, Cameron Lake, Red Rock Canyon, the marina and the Heritage Centre. Due to the high level of day use visitors to the Park, over 64% of the visitors did not use any form of accommodation. Nearly 45% of the visitors camped in the Park and over 47% used hotels or motels.

10. In terms of sources of information influencing visitors, previous experience was the most important source. Other important sources in declining order of priority were friends and relatives, tourist information centres, maps and atlases, Glacier National Park, travel articles and travel guides. These results may indicate that advertising programs certainly have not been effective in drawing visitors to the Park. However, the results do demonstrate the importance of using basic promotions and awareness programs that are relatively inexpensive to implement.

11. Head-Smashed-In Buffalo Jump, West Edmonton Mall and the Tyrrell Museum were the most popular other Alberta attractions visited by Waterton visitors. Waterton should investigate cooperative promotions with these attractions.

12. Nearly 81% of the visitors to the Park rated their Waterton experience as excellent or very good. It should be the objective of Waterton businesses and the Park's Service to insure that this satisfaction level is maintained.

13. Visitors liked the scenery and view, the wildlife, the quiet relaxing atmosphere, the weather and the mountains the most. What they liked least was the weather, the wind, the fact that various facilities and services in the Park were not open, and high prices. The Waterton marketing program should highlight what people like the most, especially in terms of differentiating the

Park from other Park destinations. Promotional materials should also inform the visitor of changing weather conditions and services available outside of the summer months.

14. Visitor suggestions for improvements included more or better camping facilities, more facilities and activities and more places open outside of the summer months.

15. During the survey period, there was an estimated 118,112 vehicles (or travel parties) that expended an estimated $8.9 million in the Park. The total annual visitation is estimated at 325,338.

7.0 METHODOLOGY

7.1 Overall Research Strategy

The Exit Survey presented an opportunity to provide a comprehensive data base concerning visitors to Waterton National Park across an entire twelve month period. This provided a unique opportunity to examine the differences in visitor characteristics and behaviour by season as a basis to identify opportunities for improvement of tourism in Waterton. Towards this end, the overall research strategy was based on a number of key principles. These were:

- **Quality and rigor in data collection were paramount.**

  Throughout the entire study including the design, execution and analysis stages, considerable care was taken to ensure that the concern for quality took precedent over size of sample, cost minimization, and rapid production of findings. Particular importance was attached to ensuring the highest quality possible within the interviewing process. It was recognized that the quality of subsequent analysis and interpretation depended directly on the care and rigor which the data had been collected in the field from Waterton Park visitors.

- **The involvement of local residents in the research process was critical to success in administration of the survey.**

  Throughout the survey period process, with the strong support of the Steering Committee, a substantial effort was made to ensure that local residents and businesses within Waterton were an integral and meaningful part of the research process. It proved extremely important that this involvement be substantial rather than token so that at the end of the process they would not only understand the results but be enthusiastic about the implementation of the strategies evolving from them.

Two aspects of this involvement were particularly important. First, local residents were heavily involved in defining the research objectives and in reviewing the broad non-technical dimensions of the research process. Second, local residents were used exclusively as interviewers in the data collection process. In retrospect, it is likely that the low number of cancelled survey stints and the low number of spoiled or incomplete interviews can be attributed to this decision to involve local residents who were very committed to the processing of conducting a comprehensive exit survey.

7.2 The Survey Instrument

Once the above principles had been accepted, they were first implemented at the survey instrument design stage. The following major activities were involved:

- identification of those variables that had to be measured in order to achieve the objectives of the survey;
- the elaboration of questions which would efficiently and effectively capture the required information;
- preparation of draft questionnaires and subsequent pre-testing to identify problems for correction in wording and the administration process;
- review by the Steering Committee, particularly by Alberta Tourism, to ensure that the definitions and measures being employed were consistent with that of previous relevant studies in order to ensure comparability; and
- ongoing review and pre-testing on an interactive basis to arrive at a final approved version. This version, the 14th, is contained in the Appendix.

7.3 Measurement of Total Traffic Flows

An important starting point for the planning of the sampling procedure and for the subsequent analysis of the data was to ensure a comprehensive and accurate method for measuring total traffic flow into the Park at all levels of aggregation and disaggregation. Fortunately, the situation at Waterton Park is as close to ideal as one can expect in conducting a survey. There is only one formal access road, thus permitting the gathering of vehicle count data on a systematic basis. Mechanical and electronic traffic counters were installed, maintained and monitored by Environment Canada-Parks at two points on the exit lane on the park access road and within the park gate. Counter failure occurred from March 9 to April 1 requiring an estimate to be developed based on daily traffic estimates before and after this period and actual counts during stints.

7.4 Target Population and Sampling Frame

The target population of the survey was all persons of 16 years or older who visited Waterton Lakes National Park for recreational purposes during the period November 1, 1986 to October 31, 1987. According to this definition, individuals who visited Waterton for purposes of working, for delivery/sale of goods and services or as a permanent resident were excluded from the population. In terms of sample selection, this meant that an initial screening question was required to identify and exclude non-conforming visitors for the sampling frame. Responses to the screening question were recorded on the "Vehicle Record Sheet", a copy of which is included in the Appendix.

The large number of completed interviews scheduled and completed during the summer period permitted more extensive breakdown and analysis of the data. Specifically, the stint periods during the summer season were drawn independently from weekday and weekend time frames. Extra weekend stints were drawn to ensure adequate representation during peak weekend traffic periods. Finally, the actual hours during which the survey was conducted for each season were:

Summer	7:00 am - 10:00 pm
Spring/Fall	8:00 am - 8:00 pm
Winter	8:00 am - 5:00 pm

The above hours allowed for maximum representation during daylight hours. Twilight and darkness would jeopardize the safety of the survey crew members.

7.5 Sampling Procedure

Full details of the sampling procedure are included in the document, "Waterton Park Exit Survey - Manual for Survey Crew". The following is a brief overview extracted from that document.

The total year was divided into four seasons as follows:

Winter	November 1, 1986 - April 14, 1987
Spring	April 15, 1987 - June 14, 1987
Summer	June 15, 1987 - September 7, 1987
Fall	September 8, 1987 - October 31, 1987

Each season was divided into three hour stints and an independent sample of stints was randomly selected for each season. The number of stints related and corresponding number of interviews scheduled realized was as follows:

	Winter	Spring	Summer	Fall	Total
Number of Stints					
Scheduled	72	32	44	32	180
Realized	70	31	43	28	172
Number of Interviews					
Scheduled (Target)	400	400	1200	400	2400
Realized	341	337	839	149	1666

Only eight stints were cancelled. Seven of them were cancelled due to severe weather conditions and one was missed due to administrative error. No replacement stints were drawn due to the small number and circumstances for cancellation. Stints that were shortened due to darkness or the onset of severe weather conditions have been included in the realized number of stints. The realized number of interviews are significantly less than target due to considerably less visitor traffic than anticipated. The sampling frame was based on qualified visitor estimates by the Canadian Parks Service that were 40 to 80% higher than actual. Another factor was that the length of interview was double the length originally planned. Some interviews took as long as 30 minutes. The longer interviews were preferred to ensure quality in the data gathered rather than forcing interviewers to hastily complete questionnaires. Only eight completed questionnaires were disqualified from the analysis due to non-qualified respondent, misleading or sarcastic responses, or missing pages.

The data collection or sampling procedure approximates a simple random sampling design. The statistical validity of the sample size was a major consideration in targeting the number of interviews or cases for each season. For the summer season, approximately 400 cases were required to achieve a margin of error within +/- 5%, 19 times out of 20 (ie. 95% or all possible samples). Approximately 390 to 397 cases were required for the other seasons to achieve the same level of reliability. In the winter and spring seasons, the margin of error increased to within +/- 8% due to the achievement of 341 and 337 cases, respectively. The margin or error increased to within +/- 10 to 15% for the winter season due to the achievement of only 149 cases during the sampling stints.

For the 12 month period, the responses have a margin of error within +/- 5%, 19 times out of 20.

In the interpretation of the survey results, "0" should be interpreted as less than 1/2 of one percent. Extreme caution should be taken in analyzing results in cross-tabulations where the responses per cell are very small.

7.6 Data Collection Procedures

The data collection procedure was designed to ensure:

1. that the random sample was implemented as accurately as possible; and
2. that the interview process was carried out in an unbiased manner.

The first of these goals was achieved through instructions which clearly defined how both vehicles and individuals in vehicles were to be selected. The second was pursued by means of careful selection, training and supervision of the interviewing staff. In this regard, particular note should be made of the high level of interviewer commitment and performance, due largely (we believe) to the policy of hiring local personnel for this important task.

Readers interested in further details concerning Data Collection Procedures are again referred to the "Manual for Survey Crew".

7.7 Weighting Procedure

In order to ensure that the sample was representative of the population of interest, a weighting scheme was formulated which involved the application of the inverse of selecting probabilities. Specifically, a multi-stage probability sample has been generated with the interviewing unit being the individual.

Using this approach, the probability of an individual being selected for an interview was dependent upon:

TABLE VII-1

WATERTON EXIT SURVEY

BASIC WEIGHTING PLAN FOR CASES TO DETERMINE TOTAL VISITATION (16 YEARS OF AGE AND OLDER)

Weight 1 Season/Weekday or Weekend Traffic Flow and 24 Hour Adjustment

$$= \frac{\text{Visitor Traffic During Stints in a Season - Weekday or Weekend}}{\text{Visitor Traffic for a Season - Weekday or Weekend}} = P_s$$

Weight 2 Case Weight for Traffic Flow

$$= \frac{\text{No. of Cases Interviewed in a Stint}}{\text{Visitor Traffic During a Stint}} = P_v$$

Weight 3 Party Weight

$$= \frac{1}{\text{(Total number of eligible respondents in each vehicle interviewed)}} = P_i$$

FINAL WEIGHT

$$= \frac{1}{(P_s \times P_v \times P_i)} = P$$

Note:

For responses to questions regarding the entire party in the vehicle, Weight 3 is eliminated.

- the probability of a vehicle being selected during the season on a weekend or weekday (P_s)
- the probability of a vehicle being selected during an interview period (P_v)
- the probability of an individual being selected from among the occupants of a vehicle (P_i)

These probabilities are translated into weights as shown in Table VII-1. The first weight is to adjust for 24 hour traffic since the stint periods were only sampled during daylight hours. Actual traffic counts for the 24 hour period were used to estimate visitor traffic volumes as shown in Table VII-2.

Based on the foregoing, the probability of any individual being included in the sample is P (being interviewed)

$$P \text{ (being interviewed)} = P_s \times P_v \times P_i$$

Accordingly, the weight that is applied to <u>each interview</u> within the sample will adjust for the respondent's individual selection probability. The weight will consist of the <u>inverse</u> of the respondent's selection probability.

$$\text{ie. } P = 1/(P_s \times P_v \times P_i)$$

In situations where questions are phrased in a way which applies to any of the occupants in a vehicle, the probability P_i is excluded from the weighting calculation.

The weighting scheme is applied to each case. Examples of the application of the weighting scheme follow for two situations:

- The respondent answered the question for all persons or the travel party in the vehicle.
- The respondent answered the question as an individual.

TABLE VII-2
WATERTON EXIT SURVEY

SUMMARY OF SAMPLE AND TRAFFIC STATISTICS

	No. of Stints (1)	No. of Cases (2)	Total Traffic During Stints (3)	Visitor Traffic During Stints (4)	% of Visitor Traffic During Stints (5)	% of Visitor Traffic Interviewed During Stints (6)	Total Traffic 24 Hours (7)	Estimated Total Visitor Traffic 24 Hours (8)
Winter (November 1, 1986 to April 14, 1987)								
Weekday	34	83	794	163	20.53	50.92	9,560	1,963
Weekend	36	258	1,398	1,048	74.96	24.62	6,279	4,707
Total	70	341	2,192	1,211	55.25	28.16	15,839	6,670
Spring (April 15, 1987 to June 14, 1987)								
Weekday	16	103	987	418	42.35	24.64	13,205	5,592
Weekend	15	234	2,542	2,106	82.85	11.11	17,489	14,490
Total	31	337	3,529	2,524	71.52	13.35	30,694	20,082
Summer (June 15, 1987 to September 7, 1987)								
Weekday	21	406	4,136	2,780	67.22	14.60	61,009	41,010
Weekend	22	433	5,387	4,353	80.81	9.95	49,694	40,158
Total	43	839	9,523	7,133	74.90	11.76	110,703	81,168
Fall (September 8, 1987 to October 31, 1987)								
Weekday	16	76	1,089	456	41.87	16.67	12,058	5,049
Weekend	12	73	978	719	73.52	10.15	6,991	5,140
Total	28	149	2,067	1,175	56.85	12.68	19,049	10,189
TOTAL	172	1,666	17,311	12,043	69.96% (9)	13.83%	176,285	118,109

Notes:

(1) Number of stints conducted. Eight stints were cancelled due to poor weather conditions. All stints were three hours unless they were shortened due to poor weather conditions or darkness.
(2) Number of completed interviews. The sample unit was an individual, 16 years of age or older, in an eligible vehicle.
(3) Based on a manual count conducted at the park's exit gate during the stints.
(4) Based on the results of screening questions asked of a vehicle driver leaving the park during the stints.
(5) Visitor traffic during stints divided by total traffic during stints.
(6) Number of cases divided by visitor traffic during stints.
(7) Total traffic counts provided by Environment Canada - Parks from electronic counters on park exit road near the survey location.
(8) For the estimate, the proportion of visitor traffic during the stint period is applied to total traffic for 24 hours. It is assumed that the proportion of visitor traffic is similar throughout the 24 hour period.
(9) Percentage during the stint periods. The percentage during the entire year is estimated at 67.00%.

For example, a respondent says that all passengers in the vehicle spent a total of $25.00 on meals and refreshments in response to a portion of Question 25a (variable 174). The vehicle was selected during the winter season on a weekday. The total number of qualified visitor vehicles passing through the exit point for the last time on their visit during the stint period is 43 with 8 stopped and interviewed. There are five eligible respondents in the vehicle from which one person is randomly selected for an interview.

Therefore,

$$P = \frac{1}{(P_S \times P_V)}$$

$$P = \frac{1}{163/1963 \times 8/43}$$

$$P = \frac{1}{.014951}$$

$$P = 66.88516$$

Therefore, the one response to this question is weighted up by a factor of 66.88516.

In the second example, the respondent answered "yes" to using the hiking trails in the Park in response to a portion of Question 14 (variable 98). The vehicle was selected during the summer season on a weekend. The total number of qualified visitor vehicles passing through the exit point for the last time on their visit during the stint period is 345 with 28 stopped and interviewed.

TABLE VII-3

WATERTON TOURISM STUDY

VEHICLE RECORD BY SEASON

SEASON	TOTAL[1] VEHICLES	% OF TOTAL VEHICLES	TOTAL[2] QUALIFIED VEHICLES	% OF QUALIFIED VEHICLES
November 1/86 to April 14/87 * (165 days)	15,839 96/day	9.0	6,670 40/day	5.6
April 15 to June 14/87 (61 days)	30,694 503/day	17.4	20,082 329/day	17.0
June 15 to September 7/87 (85 days)	110,703 1,302 day	62.8	81,168 1,156 day	68.7
September 8 to October 31/87 (54 days)	19,049 353/day	10.8	10,189 189/day	8.6
	176,285 483/day	100.0	118,109 324/day	100.0

* March 9 to April 1 was estimated due to counter failure.

1 Supplied by Environment Canada-Parks.

2 Based on the results of screening questions asked of vehicle driver leaving the park during stints.

Therefore,

$$P = \frac{1}{(P_S \times P_V \times P_i)}$$

$$P = \frac{1}{\frac{4353}{40158} \times \frac{28}{345} \times \frac{1}{5}}$$

$$P = \frac{1}{.001759}$$

$$P = 568.35025$$

Therefore, the one response to this question is weighted up by a factor of 568.35025.

TABLE VII-4

WATERTON EXIT SURVEY
ESTIMATE OF TOTAL VISITATION

November 1, 1986 to October 31, 1987

BASED ON WEIGHTED SURVEY DATA USING WEIGHTED
NUMBER OF VEHICLES AND WEIGHTED NUMBER OF PERSONS PER VEHICLE

Season	Weighted Estimate Visitor Vehicles	Weighted Average No. of Persons Per Vehicle	No. of Visits
Winter	6,604	2.71	17,897
Spring	20,155	2.66	55,426
Summer	81,164	2.81	228,071
Fall	10,189	2.29	23,944
	TOTAL VISITS		325,338

7.8 Vehicle Record Data and Total Visitation Estimate

A summary of vehicle record data by season is presented in Tables VII-3. The average number of occupants per vehicle by season is presented in Table VII-4. The vehicle count data was supplied by the Environment Canada-Parks. The calculation of the total visitation estimate is also shown in Table VII-4. The comparison of different methods to calculate total visitation is presented in the Appendix to illustrate the plausibility of the estimate presented in Table VII-4. The percentage of qualified vehicles was determined during stint periods by survey staff, staff stopping and screening all vehicles. A copy of the vehicle record sheet is included in the Appendix.

A P P E N D I X

U.S. REGIONS

QUESTIONNAIRE

VEHICLE RECORD SHEET

SKETCH OF SURVEY LOCATION

U.S. REGIONS - LISTING OF STATES

(When not individually identified)

1. Montana

2. Other Northwest States
   - Idaho
   - Washington
   - North Dakota
   - Oregon
   - Wyoming

3. California

4. Other Southwest States
   - Nevada
   - Utah
   - Colorado
   - Arizona
   - New Mexico

5. West Central States
   - South Dakota
   - Nebraska
   - Kansas
   - Minnesota
   - Iowa
   - Missouri
   - Oklahoma
   - Texas
   - Arkansas
   - Louisiana

6. East Central States
   - Wisconsin
   - Illinois
   - Indiana
   - Ohio
   - Kentucky
   - Tennessee
   - Mississippi
   - Alabama
   - Michigan

7. North Eastern Seaboard
   - Maine
   - New Hampshire
   - Vermont
   - Massachusetts
   - Connecticut
   - Rhode Island
   - New York
   - New Jersey
   - Pennsylvania

8. South Eastern Seaboard
   - Maryland
   - Delaware
   - Washington, D.C.
   - Virginia
   - West Virginia
   - North Carolina
   - South Carolina
   - Georgia
   - Florida

9. Non-Contiguous U.S.
   - Alaska
   - Hawaii

PANNELL KERR FORSTER

Serial No.....
Version #14: June 15/87

WATERTON EXIT SURVEY

Interviewer Name: _____
Interviewer No. _____
Date: _____ _____
(Day) (Month)
Exact start time of interview:
a.m.
_____ p.m.

Sample (Circle One):
1 2

Season (Circle One):
Winter, Spring, Summer, Fall

Stint Period (Circle One):
1 2 3 4 5

Vehicle	(✓)
Car	
Station Wagon	
Truck	
Truck Camper	
Van	
Motorhome	
Motorcycle	
Bicycle	
Other (Specify) _____	

Equipment	
Tent Trailer	
Travel Trailer	
Horse Trailer	
Golf Cart (motorized rider)	
2nd Vehicle	

Thank you for stopping. We are conducting a survey of visitors to gather information which will be very important to planning the future of this park. To randomly select a person for the interview, I would like to know whose birthday comes next. (Ask if person is 16 years of age or older, if questionable. If not, select the person with the next birthday who is 16 years of age or older.)

1. How many people are there in this vehicle? (Can be completed by observation.)

   _____ persons

2. Where is your regular place of residence?

_____

(specify nearest Community/Province/State/Country)

3a. (Show Card #1) What is the main purpose of this trip?
(Interviewer should read out list as interviewee reads the card.)

3b. What are the other purposes of this trip, if any?
(Multiple response allowed. Interviewer should read out list as interviewee reads the card.)

	Main (3a)	Other (3b)
Attending a special meeting	1	1
Business	2	2
Personal business, such as shopping, etc.	3	3
Personal or family affairs, such as visiting friends or relatives, attending weddings, etc.	4	4
Vacation	5	5
Day-use recreation or social activities	6	6
Other - specify _____	7	7
None or no response	8	8

4. What attracted you or influenced your decision to visit Waterton Lakes National Park?

_____

_____

_____

_____

_____

5. What is the furthest place from home you have visited or will visit on this trip?

_____

Don't know _____

6. What was or will be the main destination of your trip away from home within Alberta?

Banff	_____	Edmonton	_____	Waterton	_____
Calgary	_____	Jasper	_____	Lethbridge	_____
Other (Specify)	_____			No place in particular	_____

7. On this entire trip, how many nights will you be away from home?

_____ nights None _____ If none, skip to question 11.

8. How many nights will you spend in Alberta on this trip?

_____ nights None _____ If none, skip to question 11.

9. How many nights have you spent in Waterton Lakes National Park?

_____ nights None _____ If none, skip to question 11.

10. What type of accommodation did you use in Waterton Lakes National Park? (Multiple response allowed.)

Hotel/motel	_____	Townsite Campground	____
Rented cottage	_____	Crandell Mountain Campground	____
Home/cottage of friend		Belly River Campground	____
or relative	_____	Pass Creek Campground	____
Own cottage	_____	Campground unable to name	____
		Backcountry camping	____
		Other: _____	____

Note: If "camping" is response, ask which campground?
If "cottage" is response, ask if rented or owned by someone else?

11. What other communities, attractions and events in Alberta have you visited or do you plan to visit on this trip?

Communities?	Attractions and Events?
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Will not visit any communities, attractions or events in Alberta outside of Waterton Park. If yes, (✓) ____

12. (Show Card #2). Which of the items listed on the card are available for you to use on this trip?

Still Camera	1	Bicycle	9	Golf Clubs	15
Movie Camera	2	Tent	10	Sailboard	16
Videotape Camera	3	Hiking Boots	11	X-Country Skis	17
Binoculars	4	Backpacking/ Climbing Equip.	12	Snowmobile	18
Field Guides	5			Downhill Skis	19
Boat	6	Fishing Equip.	13	Snowshoes	20
Canoe/Kayak	7	Snorkel/Scuba Equipment	14	Other: _____	21
Motorcycle	8			No items	22

13. (Show Card #3). Which of the attractions listed on the card did you visit while in Waterton Park?

	Circle
Buffalo Paddocks	1
Prince of Wales Hotel	2
Cameron Falls	3
Cameron Lake	4
Kootenai Brown's Grave	5
Red Rock Canyon	6
Goat Haunt	7
Oil City Historical Cairn	8
Peace Park Pavilion	9
Golf Course	10
Heritage Centre on Main Street	11
Marina	12
Other: _____	13
Did not visit any attractions	14

14. (Show Card #4). Which of the facilities and programs listed on the card did you use or participate in while in Waterton Park?

	Circle
Hiking Trails	1
Interpretive and Education Programs	2
Park Information Centre	3
Horseback Riding Stables	4
Golf Course	5
Bicycle/Scooter Rental	6
Boat/Canoe Rental	7
Scenic Boat Tour	8
Church Camp	9
Convention Centre	10
Swimming Pool	11
Other: _____	12
Did not use any facilities or participate in programs	13

15. Have you visited or will you visit Glacier National Park in Montana while on this trip? Please exclude your visit to the park on the Scenic Boat Tour. (If applicable.)

Yes _____ No _____

16. (Show Card #5). Please give me the number for each activity you participated in while in Waterton Park.

sightseeing by car	1	hiking/backpacking in your own group or by yourself	25
sightseeing by bus	2		
walking	3		
jogging/running	4	hiking/backpacking with a naturalist	26
shopping	5		
reading	6	horseback riding	27
photography	7	interpretive theatre presentation	28
wildlife viewing	8		
bird watching	9	canoeing/kayaking	29
vegetation or flora viewing	10	boating excluding scenic boat tour	30
attending a special event	11	sailing	31
dining at a restaurant or lounge	12	sailboarding	32
		mountaineering	33
drinking at a restaurant, bar or lounge	13	ice climbing	34
		other sports activities	35
dancing	14	scientific study/ research	36
going to the movies	15		
resting or relaxing	16	visiting museums, historical displays or sites	37
watching T.V.	17		
swimming	18	picnicking/cookouts	38
scuba diving	19	cross-country skiing	39
snorkeling	20	snowshoeing	40
tennis	21	skating	41
golf	22	snowmobiling	42
fishing	23	other _____	43
cycling	24	did not participate in any activities	44

17. Where did you get information for planning this trip to Waterton Park?

_____

_____

18. (Show Card #6). When did you make the final decision to make this visit to Waterton Park?

Today	1	Within the past three months	4
Within the past week	2	Within the past year	5
Within the past month	3	More than a year ago	6

19a. Have you previously visited Waterton Park?

Yes _____ No _____ If no, skip to question 20.

19b. Excluding this visit, how many times have you visited Waterton Park in: the past three years? _____

the past two years? _____

the past year or 12 months? _____

20. What did you like most about this visit to the park?

_____

_____

_____

21. What did you like least about this visit to the park?

_____

_____

_____

22. (Show Card #7). According to the scale on the card, how would you rate your overall satisfaction with this visit to Waterton Park?

Poor _____ Fair _____ Good _____ Very Good _____ Excellent _____

23. What is special, if anything, about Waterton Park that makes it different from other parks you have visited?

_____

_____

_____

24. What attractions, facilities or services are needed in the park to improve your experience in the park?

_____

_____

_____

25a (Show Card #8). What expenses did all the people in this vehicle make in Waterton Park on this trip, including credit card purchases, for each of the categories on the card?

		Working Column	$ Amount
1)	Meals and refreshments bought in restaurants and hotels	_____	_____
2)	Groceries and beverages bought in stores	_____	_____
3)	Accommodation - hotel/motel, camping, cottage rental, etc.	_____	_____
4)	Automobile gas and oil	_____	_____
5)	Automobile maintenance and repair	_____	_____
6)	Park entrance fees and licenses	_____	_____
7)	Recreation and entertainment such as boat rentals, movie admission, boat cruises, bike rentals, etc.	_____	_____
8)	Conference or convention registration fees	_____	_____
9)	Retail store purchases such as souvenirs, equipment, film, clothing, etc.	_____	_____
10)	All other goods and services.	_____	_____
	ADD AMOUNTS TO CREATE TOTAL AMOUNT		_____ $

25b Did you respond in Canadian or U.S. dollars? (circle response)

Cdn. U.S.

Finally, I would like to ask you a few questions to assist in the analysis of our survey results.

26. (Show Card #9). Which category best describes the group travelling in this vehicle?

	Circle
Couple	1
Family/Relatives	2
Friends	3
Business Associates	4
School Group	5
Club/Association/Convention Group	6
Seniors Group	7
By Myself	8
Other - specify _____	9

27. (Show Card #10). Which age category number are you in? For each person travelling with you in this vehicle, what age category number are they in?

		Circle Response	Other Persons Travelling With the Respondent (indicate number of persons in each age category)
(1)	0 to 5 years	1	_____
(2)	6 to 15 years	2	_____
(3)	16 to 19 years	3	_____
(4)	20 to 24 years	4	_____
(5)	25 to 34 years	5	_____
(6)	35 to 44 years	6	_____
(7)	45 to 54 years	7	_____
(8)	55 to 64 years	8	_____
(9)	65 to 74 years	9	_____
(10)	75+ years	10	_____
	Refused	_____	_____

Note: The respondent plus numbers in the second column should equal response to Question #1.

28a. (Show Card #11). Which category number represents your total annual income before taxes?

28b. Which category number represents the total annual income before taxes for your household?

		Total Personal Income	Total Household Income
Less than $10,000 Cdn.	(Less than $7,500 U.S.)	1	1
$10,000 to $19,999 Cdn.	($7,500 to $14,899 U.S.)	2	2
$20,000 to $29,999 Cdn.	($14,900 to $22,399 U.S.)	3	3
$30,000 to $39,999 Cdn.	($22,400 to $29,899 U.S.)	4	4
$40,000 to $49,999 Cdn.	($29,900 to $37,299 U.S.)	5	5
$50,000 to $59,999 Cdn.	($37,300 to $44,799 U.S.)	6	6
$60,000 to $69,999 Cdn.	($44,800 to $52,299 U.S.)	7	7
$70,000 + Cdn.	($52,300 + U.S.)	8	8
Refused		____	____

Definition of Household - People who live in the same dwelling including those not related or not part of the same family.

29. What is your occupation?
What type of company you work for?

_____ in _____

Type of Job Type of Company

30. (Show Card #12). Which education category number are you in?

No formal education	1
Some grade school	2
Completed grade school	3
Some high school or secondary school (at least one year)	4
High school or secondary school graduate	5
Some vocational or technical school	6
Vocational or technical school graduate	7
Some university	8
University graduate	9
Post-graduate university	10
Refused	____

31. For my supervisor to verify that you were surveyed, can you give me your first name, area code and telephone number?

Name: _____

Telephone No. including area code: .

_____ _____

Refused _____

If resident of Canada or U.S.A., ask for Postal Code or Zip Code.

Postal Code/Zip Code _____

Sex of Respondent:

Male _____ Female _____

Give respondent our special souvenir and thank him or her for their responses. END INTERVIEW.

Completed by _____

VEHICLE RECORD SHEET

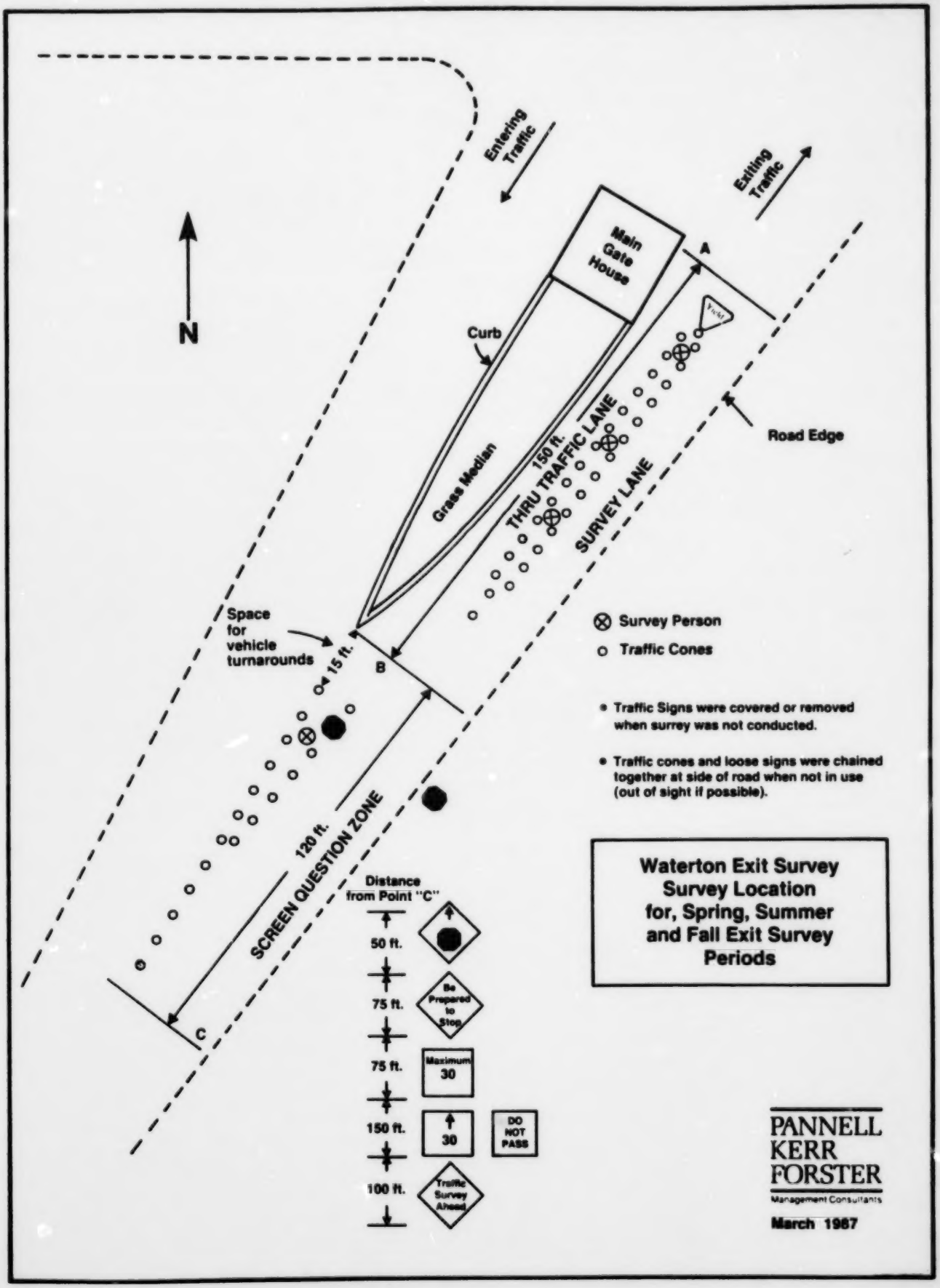
DAY: _____ DATE: _____ HOUR: _____ am/pm to _____ am/pm

HELLO! We're conducting a survey of visitors to Waterton Park.

One mark ( ) or (1) represents a vehicle. Only one (✓) or (1) per question.

Type of Vehicle	Vehicle Did Not Stop	1. What is the purpose of your trip today?				2. If OTHER, ask: Will you be returning to the park today?		3. If NO ask: Can you please pull over for a few minutes for the interviewer to ask you a few questions?		
		Commuting to or From Work	Pickups, Making Deliveries, Service or Sales Calls	Park Employee Or Resident	Other* (Ask Question #2)	NO (Ask Question #3)	YES	Stopped	Did Not Stop or Refused	Not Able to Interview
Car or pick-up truck/ car or pick-up truck with equipment trailer.										
Car or pick-up truck with travel trailer, camper truck, van or recreation vehicle										
Motorcycle										
Passenger Bus										
Truck										
Bicycle										
Pedestrian										
Machinery, snowplow, tractor										
TOTAL										

* Other includes attending a special meeting, business, day-use recreation or social activities, staying at the cottage, personal business such as shopping, personal or family affairs such as visiting friends or relatives, vacation, etc.



Waterton Exit Survey
Survey Location
for, Spring, Summer
and Fall Exit Survey
Periods

PANNELL KERR FORSTER
Management Consultants

March 1987

WATERTON EXIT SURVEY
ESTIMATE OF TOTAL VISITS

November 1, 1986 to October 31, 1987

BASED ON WEIGHTED SURVEY DATA USING ESTIMATES BY AGE CATEGORY

	No. of Visits
No. of Visitors 16 years of age and older	262,274
No. of Visitors 0 - 5 years of age	20,264
No. of Visitors 6 - 15 years of age	45,447
TOTAL VISITS	327,985

BASED ON UNWEIGHTED AVERAGE NUMBER OF PERSONS PER VEHICLE BY SEASON AND ESTIMATED VISITOR VEHICLES

Season	Estimated Visitor Vehicles	Unweighted Average Number of Persons Per Vehicle	No. of Visits
Winter	6,670	2.62	17,475
Spring	20,082	2.66	53,418
Summer	81,168	2.81	228,082
Fall	10,189	2.29	23,333
TOTAL VISITS			322,308 Visits

BASED ON WEIGHTED AVERAGE NUMBER OF PERSONS PER VEHICLE (ANNUAL) AND ESTIMATED NUMBER OF VISITOR VEHICLES

118,109 vehicles x 2.75 persons per vehicle = 324,800 Visits

WATERTON VISITOR VEHICLE POPULATION ESTIMATE COMPARISON OF METHODS

Season	Visitor Vehicle Estimate Based on Visitor Vehicle Count During Stints and Total Vehicle Count Using Traffic Counters	Visitor Vehicle Estimate Based on Weighting Scheme Applied to Each Case	Difference to Weighted Cases No.	Difference to Weighted Cases %
Winter	6,670	6,604	66	1.0
Spring	20,082	20,155	73	0.4
Summer	81,168	81,164	4	0.0[1]
Fall	10,189	10,189	0	0.0
Total	118,109	118,112	3	0.0[2]

[1] Less than .005%.

[2] Less than .003%.